

Form CRS – Client Relationship Summary**Introduction**

Private Wealth Partners, LLC (PWP) is an investment adviser registered with the Securities and Exchange Commission (SEC). We feel that it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.

What types of investment services and advice can you provide me?

As an SEC registered investment adviser, PWP provides the following investment services:

1. Investment advisory services to retail investors for an ongoing asset-based fee based on the value of securities and cash in your account. Our advisory services include the buying, selling and monitoring of publicly listed investments in your portfolio. Through personal discussions to understand your current financial situation, existing resources, goals, time horizon, liquidity needs and risk tolerance we will create a set of Client Investment Guidelines and manage a recommended portfolio of investments that is regularly monitored (every quarter), and if necessary, rebalance to meet your changing needs, stated goals and objectives.
2. Financial planning services to retail clients based upon your specific financial requests that require analysis, review and written recommendations or planning.

Your accounts are managed on a discretionary basis which means we don't need to confirm with you when buying or selling securities in your accounts. You can place limitations and reasonable restrictions on specific securities or industries that you do not want us to either buy or sell from your portfolio. You as a client will have the decision to buy or sell these non-discretionary securities. You will sign an investment management agreement granting us authority over accounts you designate. This agreement will remain in place until you or we terminate the relationship. Additional information about our advisory services is located in Item 4 of our Firm Brochure which is available online at www.pwpart.com.

Our account minimum size is \$1,000,000 in investable assets. We retain the discretion to waive this minimum level as fully described in item 5 of our Firm Brochure.

Questions to Ask Us:

- Given my financial situation, should I choose an investment advisory service? Why or why not?
- How will you choose investments to recommend to me?
- What is your relevant experience, including your licenses, education and other qualifications? What do those qualifications mean?

What fees will I pay?

Fees and costs affect the value of your account over time. Fees for all services that we provide vary and are negotiable. There are no set fee schedules. You will be charged an ongoing fee that is calculated and collected on a quarterly basis in arrears based on the market value of the investments in your account at the close of market on the last day of the calendar quarter. Our annual fees generally range from 1.00% to 0.40% depending on the value of the investments in your account. Our incentive is to increase the value of your account over time which will increase our fees over time. The quarterly fees can be either automatically deducted from your account or paid by check. For financial planning services we charge on an hourly or flat fee basis, depending on the scope and complexity of the service. Our hourly fees generally range from \$300 to \$500 and our flat fees generally range from \$3,000 to \$5,000.

The broker-dealer (custodian) that holds your assets may charge you a transaction fee when we buy or sell an investment for you. The broker-dealer's transaction fees are in addition to our advisory fee for our investment advisory service.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

You could also pay charges imposed by the broker-dealer holding your accounts for certain investments and maintaining your account. Some investments, such as mutual funds and exchange traded funds charge additional fees that will reduce

the value of your investments over time.

Additional information about our fees is located in Item 5 of our Firm Brochure. Our Firm Brochure is available online at www.pwpart.com.

Questions to Ask Us:

- Help me understand how these fees and costs will affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs and how much will be invested for me?
- How do you determine what fee I will be charged?

What are your legal obligations to me when acting as my investment adviser? How does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have a fiduciary duty to place the interest of our clients ahead of our own and the firm. At the same time, the way we make money creates some conflicts of interest. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are some examples to help you understand what this means:

- We offer investment management services to clients who hold a significant amount of publicly traded stock to assist them in earning premium income from writing covered call options. For these services, we will be paid a fee based on a percentage of the gross premiums (premiums before brokerage commissions) earned for the client. This performance-based fee could present conflicts of interest in that we could have an incentive to favor these client accounts.

Additional information about our conflicts of interest can be found in our Firm Brochure under Item 11 which is available online at www.pwpart.com.

Questions to Ask Us:

- How might your conflicts of interest affect me and how will you address them?

How do your financial professionals make money?

The firm's revenue is from the advisory fees we collect from advisory accounts each quarter and from the financial planning fees we collect from financial planning clients. Our financial professionals are employees of the firm and are paid a fixed monthly salary. They also receive on a quarterly basis a portion of the advisory fees that the firm collects from the accounts each adviser manages.

Do you or your financial professionals have legal or disciplinary history?

No, our firm and/or financial professionals do not have any legal and disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Questions to Ask Us:

- As a financial professional, do you have any disciplinary history? For what type of conduct?

Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD #133802. You may also contact our firm at (415) 461-3850 and talk to any one of our investment professionals or support staff and request for a copy of relationship summary and any up to date information.

Questions to Ask Us:

- Who is my primary contact person?
- Is he or she a representative of an investment adviser or a broker-dealer?
- Who can I talk to if I have concerns about how this person is treating me?