

# Form CRS – Customer Relationship Summary

## Revere Asset Management, Inc.

September 2022

### Introduction

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Revere Asset Management, Inc. (“we”, “us”, “our”) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Revere Asset Management, Inc. provides advisory services and financial planning services. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at [www.investor.gov/CRS](http://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

### Relationship Services

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#### What investment services and advice can you provide me?

We offer Investment Advisory and Consulting Services to retail investors. Our Advisory Services are tailored to a client’s specific needs and goals based on conversations and documentation related to their assets, liabilities, income, expenses, goals, and objectives. We have discretion to select the identity and amount of securities to be bought or sold for your portfolio. You may impose restrictions on investing in certain securities or types/classes of securities if you wish. All investments and portfolios are reviewed periodically throughout the year. More frequent reviews may be triggered by material changes in variables such as your individual circumstances or the market economic or political environment. Investments and. We will review more frequently if there are changes in personal circumstances, the economy, or tax laws. Account reviews are discussed with you at least on an annual basis. For additional information, please reference Form ADV Part 2A, Item 4 and Item 13.

Account minimums -We require a minimum initial investment of \$50,000. This is negotiable.

- 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 these qualifications mean?

### Fees, Costs, Conflicts and Standard of Conduct

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#### What fees will I pay?

Our advisory fees are **asset based**. We charge an annual fee of up to 1.4% based on your assets under management. These are payable on a quarterly basis, in advance. The more assets there are in your advisory account, the more you will pay in fees; thus, the firm may have an incentive to encourage you to increase the assets in your account.

In addition to the advisory fee, clients will incur charges from Financial Institution(s) and other third parties such as brokerage commissions, custody fees, exchange fees, SEC fees, mutual fund fees, exchange traded fund fees, wire transfer and electronic fund processing fees.

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. For additional information, please see our Form ADV Part 2A, Item 5

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## What are your legal obligations to me when acting as my investment adviser?

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we give to you.

## How else does your firm make money and what conflicts of interest do you have?

We have a Sub-Advisory relationship. If you participate in this arrangement, you will not pay any additional fees in addition to the advisory fee stated above. Total fees charged by both parties will be as stated in the agreement signed and not exceed the asset-based fee of 1.4% per year. One of our financial professionals holds an insurance license. If an insurance product is sold, it would be a no load, no commission, no surrender penalty product that only charges a flat percentage fee. This conflict may offer us an incentive to recommend insurance and/or investment products that produce insurance compensation for us.

## How do your financial professionals make money?

We are compensated based upon on salary.

- Help me understand how these fees and costs might 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 might your conflicts of interest affect me, and how will you address them?

## Disciplinary History

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

Yes.

A free search tool to research us and our financial professionals is available at [www.investor.gov/crs](http://www.investor.gov/crs) .

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

## Additional Information

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**Additional Information about our services is available** at <https://revereasset.com/> and if you would like to request an up-to-date copy of the relationship summary, contact us by email at [dan@revereasset.com](mailto:dan@revereasset.com) or telephone at 855-732-5932.

**Conversation Starters:** Ask your financial professional

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