

## CLIENT RELATIONSHIP SUMMARY

(Form ADV Part 3)

August 2025

**Sachem Hill LLC (“Sachem Hill”)** is registered as an investment adviser with the Securities and Exchange Commission. Brokerage and investment advisory services are different from each other, and it is important for you to understand the differences. In this Summary, “we” or “our firm” refers to **Sachem Hill**, and “you” refers to our retail investor clients and potential clients. You can access free and simple tools to research our firm and other firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers and investing.

<p>What investment services and advice can you provide me?</p>	<p>We provide investment advisory services to retail investors. These services include comprehensive portfolio management, financial planning and consulting, as well as investments in private funds for some clients. We actively monitor your investments on an ongoing basis. We manage your assets either on a discretionary basis (meaning that we can implement trades in your account without your approval), or on a non-discretionary basis (meaning that we need your approval prior to implementing a trade in your account). We do not limit our advice to a specific product or type of investment. We generally require you to have a minimum of \$10,000,000 to establish an advisory relationship with us. Our private funds typically require a minimum investment of \$250,000. However, we may waive these minimums.</p> <p>Additional information is available in Sachem Hill’s <b>Form ADV, Part 2A, Items 4 to 7 and 13</b>, which is available by clicking on this <a href="#">link</a>.</p> <p><b>Conversation Starters:</b></p> <ul style="list-style-type: none"><li>• <i>Given my financial situation, should I choose an investment advisory service? Why or why not?</i></li><li>• <i>How will you choose investments to recommend to me?</i></li><li>• <i>What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?</i></li></ul>
<p>What fees will I pay?</p>	<p>Sachem Hill’s advisory clients generally pay an annual fee of up to a maximum of 0.85% of assets under management for investment advisory services. The investment advisory fee is billed quarterly, based on assets under management, and is calculated based on the average net market value of the portfolio during the quarter. Sachem Hill clients pay an additional agreed-upon fee for certain financial planning and consulting services. Our private funds, if applicable, receive compensation in accordance with the terms outlined in each fund’s legal documents, which must be separately reviewed and agreed to by each participating client. You may also pay other indirect fees and costs related to our investment advisory services in addition to our primary fees and costs. Some investments, such as mutual funds, impose additional fees that will reduce the value of your investment over time. You may also pay a transaction fee to a custodian when we buy and sell an investment for you, as well as other fees to a custodian that will hold your assets (called “custody”).</p> <p><b>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</b></p>

	<p>your investments over time. Please make sure you understand what fees and costs you are paying.</p> <p>Additional information is available in Sachem Hill's <b>Form ADV, Part 2A, Item 5</b>, which is available by clicking on this <a href="#">link</a>.</p> <p><b>Conversation Starter:</b></p> <ul style="list-style-type: none"> <li>• <i>Help me understand how these fees and costs might affect my investments. If I give you \$10,000,000 to invest, how much will go to fees and costs, and how much will be invested for me?</i></li> </ul>
<p>What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?</p>	<p><b>When we act as your investment adviser, we are required to act in your best interest and put your interests ahead of ours. 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 provide you.</b> For example, the more assets there are in your advisory account, the more you will pay in fees, and we may therefore have an incentive to encourage you to increase the assets in your account. We advise private funds in which we may recommend to you if meet the required qualifications. This creates a conflict due to our financial incentive we have in recommending these funds.</p> <p>Additional information about our conflicts of interest is available in Sachem Hill's <b>Form ADV, Part 2A, Items 6, 8, 10 and 12</b>, which is available by clicking on this <a href="#">link</a>.</p> <p><b>Conversation Starter</b></p> <ul style="list-style-type: none"> <li>• <i>How might your conflicts of interest affect me, and how will you address them?</i></li> </ul>
<p>How do your financial professionals make money?</p>	<p>Our financial professionals' compensation is partially based on the amount of client assets they service or revenue the firm earns from the financial professional's advisory services. Thus, our financial professionals are incentivized to increase the amount of your assets that they manage.</p>
<p>Do you or your financial professionals have legal or disciplinary history?</p>	<p>No. Please visit <a href="https://www.investor.gov/CRS">Investor.gov/CRS</a> for free and simple search tools to research us and our financial professionals.</p> <p><b>Conversation Starter:</b></p> <ul style="list-style-type: none"> <li>• <i>As a financial professional, do you have any disciplinary history? For what type of conduct?</i></li> </ul>
<p>Additional Information</p>	<p>More detailed information about our firm is available in Sachem Hill's <b>Form ADV Brochure</b>, which is available by clicking on this <a href="#">link</a>. For additional information or an additional copy of this Client Relationship Summary, you may contact us at 303.625.6868 or <a href="mailto:info@sachemhill.com">info@sachemhill.com</a>.</p> <p><b>Conversation Starter</b></p> <ul style="list-style-type: none"> <li>• <i>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?</i></li> </ul>