Bishop & Company Investment Management, LLC
Customer Relationship Summary – November 2026

Bishop & Company Investment Management, LLC ("Bishop") is registered with the U.S. Securities and Exchange Commission ("SEC") as an Investment Adviser. The services offered and fees charged by an Investment Adviser differ from those of brokers. It is important to understand the differences. There are free and simple tools available for investors to research firms and financial professionals at Investor.gov/CRS. This site also provides educational materials about broker-dealers, investment advisers, and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

Bishop offers investment advisory services to retail investors through our Discretionary Investment Management service, including comprehensive financial planning tailored to your life goals - incorporating retirement, tax efficiency, liquidity needs, and major life transitions. Bishop will assist you in designing your long-term investment objectives by identifying your rate of return goals, your investment time horizon, your available resources and risk tolerance. We will recommend an asset allocation strategy based on those objectives and identify securities suitable for you. We believe the most prudent way to build long-term wealth is to broadly diversify your account through the use of exchange traded funds ("ETFs") and no-load mutual funds. However, clients may own other types of securities and we reserve the right to recommend a non-mutual fund or ETF investment. Our service includes ongoing, regular monitoring of your investment portfolio including daily reports that flag accounts out of alignment and the rebalancing of your portfolio when necessary. Bishop manages your account with discretionary authority. This means that we will be authorized to buy and sell the securities in your account without seeking approval in advance. Bishop generally requires a minimum investment of $1,000,000 to establish a new management relationship; however, this is negotiable.

For more detailed information about all of our services, refer to our Form ADV 2A.

QUESTIONS YOU SHOULD ASK THE FINANCIAL PROFESSIONAL:

- ***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?***

WHAT FEES WILL I PAY?

Description of Principal Fees and Costs: Fees for our Discretionary Investment Management clients are charged based on the asset value of your account. These fees are assessed on a quarterly basis and paid in advance. Since we are an investment adviser which charges an asset-based fee, the more assets there are in a retail investor's advisory account, the more a retail investor will pay in fees, and therefore we have an incentive to encourage you to increase the assets in your account.

Description of Other Fees and Costs: All fees paid to Bishop are separate and distinct from the fees and expenses that may be charged by Third Parties such as custodians, banks and brokers. Other fees charged to your account are fees such as brokerage commissions, transactions fees, SEC fees, and custodial fees. There are also certain product-level fees such as management and administrative fees charged by mutual funds and ETFs. These fees can be found in the prospectus of each investment.

Additional Information: 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.

The fees for investment advisory services are described in further detail in our ADV Part 2A brochure, Item 5.

QUESTIONS YOU SHOULD ASK THE FINANCIAL PROFESSIONAL:

- ***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 with be invested for me?***

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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?

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 provide you. Here are some examples to help you understand what this means.

We recommend Charles Schwab ("Schwab") as a custodian for our clients. The contract we have with Schwab includes a benefit agreement which states that certain services provided by Schwab are free if Bishop keeps the assets held at Schwab above a certain threshold. Additionally, Bishop receives discounts for certain third-party vendor services through our contract with Schwab. While these benefits have no direct cost to our clients, this creates an incentive for Bishop to recommend Schwab over other custodians.

Bishop also conducts IRA rollovers from 401(k) plans for our clients. It will benefit Bishop to recommend a rollover or increase the assets managed by Bishop which constitutes a conflict of interest as the more assets we manage, the more you will pay Bishop in advisory fees. We mitigate this conflict by discussing all of your options to help you determine the most appropriate choice for you.

QUESTIONS YOU SHOULD ASK THE FINANCIAL PROFESSIONAL:

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

Additional Information: For more detailed information regarding conflicts of interest, please see our Form ADV, Part 2A Brochure.

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

At Bishop, our financial professionals are paid a salary and non-cash compensation in the form of an employee benefits package. The President and Managing Member will retain additional compensation based upon the success of the firm as a whole.

Our financial professionals does not receive any other type of payment from our firm except for compensation derived from the intake of client fees.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

Yes, our financial professional has a legal or disciplinary history. Please visit Investor.gov/CRS for a free search tool to research Bishop and our financial professionals.

QUESTIONS YOU SHOULD ASK THE FINANCIAL PROFESSIONAL:

- ***As a financial professional, do you have any disciplinary history? If so, for what type of conduct?***

You may find additional information about Bishop and our advisory services on the SEC's website at www.adviserinfo.sec.gov. Please call us at (814) 314-0344 for up-to-date information about our services or to request a copy of our relationship summary.

QUESTIONS YOU SHOULD ASK THE FINANCIAL PROFESSIONAL:

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