Mesirow

Form CRS Relationship Summary – July 1, 2026

Precision Fiduciary Partners, LLC ("PFP") is an SEC-registered investment adviser that provides advisory services. This document is a summary of the types of services we provide and how you pay for these 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 Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

Q What investment services and advice can you provide me?

PFP offers the following principal investment advisory services: Investment advisory services, business and non-profit retirement plans, investment management model programs, and third-party managed assets.

PFP provides ongoing oversight of the account. All investments are monitored for performance relative to benchmarks, peers, and/or PFP expectations, as applicable, and are rebalanced as necessary upon PFP review. More frequent rebalancing may be triggered by material changes in variable as defined in the ADV Part 2A.

Generally, we manage your account(s) on a discretionary basis. This means that we have the authority to determine, without obtaining client consent each time, the securities to be bought or sold and the amount of securities to be bought or sold in your account(s). Non-discretionary services are also available. Non-discretionary portfolio management is understood to mean that PFP must first get Client permission before placing any trades to buy or sell securities in a Client account. PFP is free to determine the timing of a particular transaction; however, permission must first be obtained from the Client. Clients should be aware that delays in granting permission for a transaction may hinder PFP's ability to effectively manage a portfolio. We tailor your investment portfolio to your situation. You may place limitations, or restrictions, on investment or brokerage discretionary authority. For additional information, see Item 12 and Item 16 of our ADV Part 2A, which can be accessed here.

PFP generally does not impose a minimum account size for establishing a relationship. For additional information, see Item 4 and Item 7 of PFP's ADV Part 2A, which can be accessed here.

You are encouraged to ask us questions including the following to help you better understand our services:

- 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?

Please refer to our Form ADV Part 2A Brochure for more detailed information about our services and our Form ADV Part 2B Brochure for contact information for our financial professionals' supervisor.

Q What fees will I pay?

Our annual management fee ranges from 0.25% - 2.00% on assets under management and is billed quarterly in advance or arrears as listed in the agreement. You pay this fee whether you make or lose money on your investments. The more assets in your advisory account, the more you will pay in fees; thus we have an incentive to encourage you to increase the assets in your account. Fees and costs will reduce any amount of money you make on your investments over time.

The fees you pay to PFP do not include the fees and expenses charged to you by the following: mutual fund companies as mutual funds charge shareholders advisory fees, administrative fees and other operational related fees and expenses; commissions or transaction costs charged by your custodian or the executing broker we may select when purchasing or selling securities; and custody and related administrative fees charged by broker dealers and custodians.

Please make sure you understand what fees and costs you are paying. Please refer to our Form ADV.

Q 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 advisor, we must act in your best interest and not put our interest ahead of yours. At the same time, the way we generate revenue creates some conflicts of interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you.

- *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? How much will be invested for me?*

Here are some examples to help you understand what this means:

- We have an affiliated commodity trading advisor, have multiple affiliated investment advisers, and an affiliated registered municipal advisor. If you as a natural person fell under both the retail and institutional definition, and invested, a conflict of interest would arise as we would receive additional compensation for providing those services to you.
- Despite these conflicts, we are fiduciaries to you. That means we are required to act in your best interest throughout our entire advisory relationship, and we take this obligation seriously. Please refer to our Form ADV Part 2A Brochure for more detailed information about our conflicts of interest. You are encouraged to ask us questions including the following to help you better understand our conflicts of interest: How might your conflicts of interest affect me, and how will you address them?

Q How do your financial professionals make money?

PFP employees do not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

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

Yes. A free and simple search tool to research us and our financial professionals is available at https://www.investor.gov/CRS. You are encouraged to ask us questions including the following to help you better understand our disciplinary history:

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

Additional Information

Please refer to our Form ADV Part 2A Brochure for more information about our services. You may request updated information and a copy of our Relationship Summary by contacting us at 512.879.1505 or pfpservice@mesirow.com.

You are encouraged to ask us questions including the following to help you better understand our disciplinary history:

- *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?*