Arrowroot Family Office, LLC

Form CRS - Customer Relationship Summary

October 2026

Is Introduction

Arrowroot Family Office, LLC (the "**Adviser**") is an investment adviser registered with the Securities and Exchange Commission. Registration of an investment adviser does not imply a certain level of skill or training. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. 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 investment services and advice can you provide me?

Depending on the nature of the account and your needs, our firm may offer you portfolio management (we review your portfolio, investment strategy, and investments) and selection of other advisers (we select a third-party adviser for you). We do not limit the types of investments available to you, and you make the ultimate decision regarding the purchase or sale of investments. To open an account, we generally require a minimum account size of $25,000, however, this minimum may be waived in our discretion. We also offer financial planning services, asset allocation and re-balancing services, and educational seminars and speaking engagements.

As part of our advisory services, we monitor the securities held in your account(s) on an ongoing, continuous basis and communicate with you periodically through telephone, email, and in person meetings. This review is done to monitor your portfolio for compliance with your investment objectives and risk tolerance. This review is a standard part of our advisory services. You are responsible to inform us of any changes in your investment objectives and/or financial situation.

Additional information about our advisory services is located in Item 4 and Item 7 of our Form ADV Part 2A (the "Brochure') which is available online at https://adviserinfo.sec.gov/firm/summary/168744.

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?

If you open an investment advisory account with us, you will be charged an ongoing asset-based fee on the value of cash and investments in the advisory account. The fees are charged to you either quarterly in arrears or monthly in advance. Fees for financial planning services are negotiable and are based on the scope of the engagement and level of complexity.

Some investments (*e.g.*, mutual funds, variable annuities) impose additional fees (*e.g.*, transactional fees and product-level fees) that reduce the value of your investment over time. The same goes for any additional fees you pay to a custodian. Also, you will pay transaction fees, if applicable, when we buy or sell an investment for your account.

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.

Additional information about our fees is located in Item 5 and Item 6 of our Firm Brochure. Our Firm Brochure is available online at https://adviserinfo.sec.gov/firm/summary/168744.

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?

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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 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 affect the recommendations we provide you."** ***Here are some examples to help you understand what this means.***

- We may recommend you investments in certain private funds that are managed by us or our affiliates. Therefore, a potential conflict may exist in that we or our affiliates may receive certain economic benefit from investments made in such funds.

- We may recommend services offered by members of our firm that are separate and unaffiliated with our firm. Therefore, a potential conflict of interest exists in that members of the firm have financial incentives unrelated to the firm to recommend these separate services to you.

- In a fee arrangement based on percentage of assets under management, the amount of assets in your account affects our advisory fee. Therefore, the more assets you have in your advisory account, the more you will pay us, and thus, we may have an incentive to recommend riskier or more speculative investments to increase those assets in order to increase our fee.

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Additional information about our conflicts of interest can be found in our Firm Brochure under Item 5, 6, and 11 which is available online at https://adviserinfo.sec.gov/firm/summary/168744.

Questions to Ask Us:

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

How do your financial professionals make money?

Our financial professionals are employees who are compensated in a couple of ways. Some receive salary and an annual bonus at the discretion of management, that is not related to the performance of retail investors' accounts. Others will receive a percentage of the advisory fees. Additional assets under management and management fees paid by retail investors may result in direct or indirect increase in that financial professional's overall compensation, including, but not limited to, discretionary bonus, if any.

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

Yes, One of our supervised persons have legal and disciplinary history. Visit www.investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Questions to Ask Us:

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- 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 https://adviserinfo.sec.gov/firm/summary/168744. You may request up-to-date information and request a copy of the relationship summary by contacting Rob Santos, our Chief Compliance Officer, at rob@arrowrootfamilyoffice.com or 833-224-2249.

Questions to Ask Us

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- 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?