

## Form CRS - Customer Relationship Summary Sunesis Advisors, LLC

Sunesis Advisors, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Investment advisory services rendered by a firm like ours differ significantly from a brokerage firm both in terms of duties to you as well as the compensation arrangements available to those firms and the representatives of those firms. It is important for you to understand these 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.

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

We function as a family office and provide not only planning and coordination, but also investment management services to our clients.

When providing financial planning and coordination, we provide advice and assistance in areas such as estate planning, tax compliance, consolidated reporting, various business services respecting private investments, and other family office services. Services are provided on an ongoing and as needed basis and you decide whether to implement our recommendations. Written plans are included in some engagements.

When providing portfolio management services, we can provide services on either a discretionary or non-discretionary basis. For example, you can provide us full discretionary authority to contract with and supervise outside investment managers who will be responsible for making and implementing ongoing investment decision and for providing ongoing investment monitoring and reporting. On the other hand, you can instead engage us on a non-discretionary basis where you choose your investment managers but we provide ongoing manager oversight, manager coordination, report oversight, etc.

Regardless of the type of engagement, we do not sell proprietary investment products or limit clients to certain types of investments. Portfolio management services are tailored to your individual needs and you may impose restrictions related to level of discretion granted, the types of investment used, etc. We generally require a \$5,000,000 minimum for services but reserve the right to accept or decline any engagement.

**For additional information about the services we provide**, please see Item 4 of our Form ADV Part 2A Brochure at [www.sunesisadvisors.com](http://www.sunesisadvisors.com).

### **Key questions to ask your 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? Is your firm dually registered as an advisor and as a broker/dealer or do you have affiliates that are registered as brokers.

### **What fees will I pay?**

For financial planning and coordination services, we generally bill client a fixed quarterly retainer fee in advance based on the scope of the engagement. Our financial planning and coordination fees, if any, are separate from any fees or expenses assessed by outside parties.

For portfolio management services, we typically charge a fixed fee based on the scope of the engagement. Our fee is agreed upon in advance, documented via an engagement letter, and invoiced to you quarterly in advance. Asset based fees create a conflict of interest in that the more an investor has in an account, the more the investor will pay in fees, giving the firm an incentive to encourage investors to increase assets in their

accounts. Our fee is separate from all brokerage charges and any other custodial fees or expenses, outside manager fees, mutual fund or ETF expenses, taxes, or other fees charged by outside parties.

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 about the fees we charge**, please see Item 5 of our Form ADV Part 2A Brochure at [www.sunesisadvisors.com](http://www.sunesisadvisors.com).

**Key questions to ask your 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 will be invested for me?

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

Some firms earn incentives by using proprietary products in client accounts, some firms share revenues with outside managers when directing client business, and some trade investments from their own inventory with their clients. We do not engage in these activities. We do however receive some non-monetary benefits from our custodian to whom we direct business and the receipt of these benefits is considered a conflict of interest.

**For additional information about our custodial arrangement**, please see Items 12 of our Form ADV Part 2A Brochure at [www.sunesisadvisors.com](http://www.sunesisadvisors.com).

**Key questions to ask your financial professional:**

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 compensated with salary and bonus compensation based on firm-wide results and do not receive economic benefits or other compensation from outside parties for investment sales.

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

No. Visit [www.investor.gov/CRS](http://www.investor.gov/CRS) for a free and simple search tool to research us and our professionals.

**Key questions to ask your financial professional:**

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

**Where to go for additional information**

**Please visit our website at [www.sunesisadvisors.com](http://www.sunesisadvisors.com) or contact us at 913-815-4460 for a current copy of this summary, for our Form ADV Part 2 Brochure, or for additional information about our firm.**

**Key questions to ask your financial professional:**

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?