

**SILICON VALLEY CAPITAL PARTNERS (SVCP), CUSTOMER RELATIONSHIP SUMMARY (FORM CRS)****Introduction**

Silicon Valley Capital Partners is registered with the Securities and Exchange Commission (“SEC”) as an Investment Adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand these differences. The SEC offers free and simple tools 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?**

Our firm primarily offers investment management services to our clients, which includes individuals, trusts, estates, foundations, charitable organizations, corporations, pension and profit-sharing plans, self-directed 401(k)s, IRAs, and IRA Rollovers.

We manage client investment portfolios on a discretionary basis. When engaged on a discretionary basis, we will buy and sell investments in your account as appropriate without requiring your pre-approval on an ongoing basis until you notify us in writing to terminate or limit our discretionary authority. Assets are typically allocated across various types of equity and fixed income securities, in accordance with your investment objectives. We tailor our advisory services to meet your individual needs and continuously seek to ensure that your portfolio is managed in a manner consistent with your specific investment profiles.

We consult with you on an initial and ongoing basis to determine your specific risk tolerance, time horizon, liquidity constraints and other qualitative factors relevant to the management of your portfolio. We monitor your portfolios on an ongoing basis while regular account reviews are conducted at least monthly as part of our standard service.

We also offer clients a range of financial planning and consulting services, which may include any or all of the following functions: Business Planning, Cash Flow Forecasting, Asset Allocation, Retirement Planning, Estate Planning, Financial Reporting, Investment Consulting, Insurance Needs Analysis, Charitable Giving, Risk Management and Distribution Planning. Reviews are conducted on an “as needed” basis or upon customer request as part of our standard service.

**For additional information about our services, please see Items 4 & 7 of our Form ADV, Part 2A Brochure available at: <https://adviserinfo.sec.gov/firm/summary/125114>.**

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?

**What fees will I pay?**

We charge our fees as a percentage of assets under management. Fees are disclosed in our Form ADV Part 1A, Item 5.E. and more fully described in our Form ADV Part 2A, Item 5. Our fee is negotiable and is charged monthly, in arrears. We reserve the right to charge your account a closure fee of \$500 per account if account(s) are closed before the one-year anniversary. Some fees create a conflict of interest described below and in more detail in our Firm's Part 2A. The more assets there are in your advisory account, the more you will pay in fees. We, therefore, have an incentive to increase those assets in order to increase our fees, although our fee percentage charges decline in tiers as total investment assets under management increase. You pay our fees even if you do not have any transactions, and the advisory fee paid to us generally does not vary based on the type of investments selected.

In addition to our advisory fees, you may also incur certain charges imposed by other third parties, such as broker-dealers, custodians, and other financial institutions. These additional charges may include securities brokerage commissions, transaction fees, custodial fees, charges imposed directly by a mutual fund or ETF, and other fees and taxes on brokerage accounts and securities transactions.

**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 our fees and costs, please see Item 5 of our Form ADV, Part 2A Brochure available at: <https://adviserinfo.sec.gov/firm/summary/125114>.**

Ask your financial professional: Help me understand how these fees and costs might affect my investments. If I give you \$100,000 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?**

We are a Fiduciary and are bound to the highest standard that was established as part of the Investment Advisers Act of 1940. **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 may receive from Fidelity, without cost to us, computer software and related systems support, which allow us to better monitor client accounts maintained at Fidelity. While we endeavor at all times to put your interests first, you should be aware, however, that our receipt of economic benefits from a broker-dealer creates a conflict of interest since these benefits may influence our choice of one broker-dealer over another. We direct trades for your portfolios to Fidelity who provides research and execution services to us that are designed to augment our own internal research and investment strategy capabilities.

Ask your financial professional: How might your conflicts of interest affect me, and how will you address them?

**For additional information, please see Item 12 of our Form ADV, Part 2A Brochure available at: <https://adviserinfo.sec.gov/firm/summary/125114>.**

### **How do your financial professionals make money?**

Depending on their role, our financial professionals are compensated through salary, bonus, and revenue earned by our firm. These payments may raise conflicts of interests due to financial incentives to increase the assets we manage.

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

No, SVCP and its financial professionals do not have reportable legal and/or disciplinary history. Visit [www.investor.gov/CRS](http://www.investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

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

### **Additional Information**

**For additional information about our services, please see Form ADV, Part 2A brochure or visit our website at [www.svcp.com](http://www.svcp.com). If you would like additional, up-to-date information or a copy of this disclosure, please call our office at 408-236-7300.**

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?