

Seven Post Investment Office LP
 FORM CRS – CUSTOMER RELATIONSHIP SUMMARY
 June 26, 2020

<p>Item 1. <u>Introduction</u></p>	<p>Seven Post Investment Office LP (“Seven Post”) 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. 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.</p>
<p>Item 2. <u>Relationships and Services</u></p>	<p>What investment services and advice can you provide me? We offer investment advisory services to retail investors including individuals and families as well as endowments, foundations and other institutions. We provide customized financial and asset allocation analysis, overall portfolio risk management, capital markets expertise, coordinated income and estate tax-planning, family office services, real estate investment management, and consolidated investment reporting.</p> <p>Monitoring We monitor client portfolios as part of our ongoing risk management process, and we seek to review portfolios with clients on at least an annual basis.</p> <p>Investment Authority Most clients give us the authority to exercise investment discretion over their accounts. We are considered to exercise investment discretion over a client’s account if we can affect transactions for the client without first having to seek the client’s consent. Clients may request further limitations on this authority (such as certain securities not to be bought or sold).</p> <p>Limited Investment Offering We do not currently make available or offer advice only with respect to proprietary products, or a limited menu of products or types of investments.</p> <p>Account Minimums and Other Requirements Seven Post generally seeks to advise clients with investable assets exceeding \$100 million and has established a minimum portfolio value threshold of \$50 million. However, under certain circumstances, this minimum asset level may be waived.</p> <p>Additional information about Seven Post services is available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/157435.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?
<p>Item 3.A <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p>	<p>What fees will I pay? Seven Post provides investment advisory and management services for an annual asset-based fee, which is negotiated with each client and currently ranges up to 1.32% of assets under management and advisement. Additionally, under certain circumstances, we have agreed to alternative fee arrangements, such as a flat fee structure. Our annual fee is prorated and charged quarterly, in arrears. The fees we earn generally increase as client accounts grow, so we have an incentive to encourage our clients to increase the amount of assets in the accounts that are under our management. Additional information about our firm’s fees are included in Item 5 of Part 2 of Form ADV, available at https://adviserinfo.sec.gov/firm/summary/157435.</p> <p>In addition to Seven Post’s investment management fee, clients may incur certain charges imposed by financial institutions and other third parties such as fees paid to sub-advisors, custodial fees, charges imposed directly by a mutual fund or ETF in the account (e.g., fund management fees and other fund expenses), deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees and other fees and taxes on brokerage accounts and securities transactions.</p>

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	<p>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.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?
<p>Item 3.B <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p>	<p>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?</p> <p>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 to you. Here are some examples to help you understand what this means.</p> <ul style="list-style-type: none"> • We manage accounts for multiple clients, and we allocate our time based on each client’s needs. Our firm earns more as we expand our client base and grow our assets under management, and we seek to balance our staffing with the individualized needs of each client. • Certain financial institutions that execute securities trades for or serve as custodians of our clients’ accounts provide various goods and services to Seven Post without charge. Although we use some of these services for research that directly benefits our clients, some provide operational and administrative assistance to us rather than directly benefitting our clients. We are not required to continue to use these financial institutions as brokers or recommend their custodial services to clients, but we have an incentive to do so based on their prior and continued services, which creates a conflict of interest with clients. <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none"> • How might your conflicts of interest affect me, and how will you address them? <p>Additional information about conflicts of interest between Seven Post and its clients is available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/157435.</p> <p>How do your financial professionals make money? All members of Seven Post’s team of financial professionals receive a salary and may receive a discretionary bonus. Certain financial professionals are also owners and receive distributions based on various factors, including percentage ownership. Compensation is set with the intention of attracting and retaining highly qualified professionals. Compensation is based on a variety of factors, including the number, value and complexity of accounts under management, the performance of those accounts, and client satisfaction and retention.</p>
<p>Item 4. <u>Disciplinary History</u></p>	<p>Do you or your financial professionals have legal or disciplinary history? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none"> • As a financial professional, do you have any disciplinary history? For what type of conduct?
<p>Item 5. <u>Additional Information</u></p>	<p>Additional information about our services can be found at https://adviserinfo.sec.gov/firm/summary/157435. If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact our Chief Compliance Officer at (415) 341-9300.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?