

This Customer Relationship Summary ("Form CRS") provides information about the types of services and fees of Hunter Lewis LLC, an investment adviser registered with the Securities and Exchange Commission. Hunter Lewis LLC provides advisory accounts and services rather than brokerage accounts and services. You should carefully consider which types of accounts and services are right for you. Additional information about Hunter Lewis LLC is also available on the SEC's website at <https://adviserinfo.sec.gov>.

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.

What Investment Services and Advice Can You Provide Me?

We can provide an investment strategy review and/or develop an investment plan for you and implement that plan through our investment strategy and management service. We can also provide an investment strategy review or create an investment plan for you without your committing to our implementing the plan by managing your assets. In addition, some investors may have to accumulate assets before management is feasible. We provide investment management on either a non-discretionary or a discretionary basis. If it is non-discretionary, we advise you, you decide, and we help you implement your transactions. If it is discretionary, we are able to buy and sell investments in your account without asking you in advance. We can also tailor your portfolio to reflect your views on the "impact" of your portfolio on society and advise on charitable giving, in both cases at no additional charge.

We will offer you advice and monitor your account on a regular basis. We will contact you (by phone or e-mail) at least annually to discuss your portfolio. We do not currently have any limitations on the types of investments we advise. Our goal of keeping total client investment expenses below 1% is very important to us. At the present time, we do not usually manage client portfolios with less than \$0.5mm of assets. This is, however, decided on a case by case basis, so there is no fixed minimum account size. More information on our services can be found under the "Advisory Business" section and the "Types of Clients" section of our firm brochure, available at <https://adviserinfo.sec.gov>.

Conversation Starters: Questions you may want to discuss with your Financial Adviser –

- **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?

If you open an account with us, either discretionary or non-discretionary, we will propose an annual fixed-dollar fee for our services, which will be payable quarterly in arrears. The fixed-dollar fee will be deducted from your account and reduce the value of your account. The amount paid to our firm does not vary based on the type of investments we select on your behalf and is payable even if we do not buy or sell securities during the billing period.

Our annual fixed-dollar fee initially represents no more than 0.4% of your assets. Our fee may increase in future years by up to 5% per year with prior notice to you. There may be circumstances in which we propose to increase our fee by more than 5% per year, in which case we will seek your prior written consent.

If you withdraw funds representing over 5% of managed capital assets (excluding interest, dividends, or other current income), our fee will be adjusted downward by 0.4% of withdrawn capital assets. If you add capital assets to your account, our fee will also be increased by an initial 0.4% of added assets.

You will likely pay a transaction fee to a broker-dealer when we buy and sell an investment for you. You will also likely pay fees to a broker-dealer or bank that will hold your assets (called "custody").

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 on our advisory service, fees, relationships, and potential conflicts of interest, see our Form ADV brochure on IAPD on investor.gov and any brochure supplement our financial professional provides to you.

Conversation Starters: Questions you may want to discuss with your Financial Adviser –

- **Help me understand how these fees and costs might affect my investments.**
- **If I give you a sum of money 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 act in your best interest and will 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:

Outside Business Activities. Some of our financial professionals also conduct other business activities during business hours. These outside business activities may take time away from servicing advisory clients or the advisory firm.

We are held to a fiduciary standard that covers our entire investment advisory relationship with you. For example, we are required to monitor your portfolio, investment strategy, and investments on an ongoing basis. As in the example above, our interests can conflict with your interests. We are required to eliminate these conflicts or tell you about them in a way you can understand, so that you can decide whether or not to agree to them. Additional information about conflicts of interest can be found on our firm brochure, available at <https://adviserinfo.sec.gov>.

Conversation Starters: Questions you may want to discuss with your Financial Adviser –

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

How Do Your Financial Professionals Make Money?

All our financial professionals are compensated by salaried base pay, hourly pay, and/or cash bonuses. The compensation arrangements and adjustments to such compensation are based on a variety of factors, including hours worked, experience, position, number of clients served, and amount of client assets serviced. For more information on the compensation of our financial professionals, please see the brochure supplement our financial professional provides to you.

Do You or Your Financial Professionals Have Legal and Disciplinary History?

No, we do not. This is noted on Form ADV Part 1, Item 11. Also refer to “Additional information” below. Please visit investor.gov/CRS for a free and simple search tool to research Hunter Lewis LLC and our financial professionals.

Conversation Starters: Questions you may want to discuss with your Financial Adviser –

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

Additional Information

If you have any questions about the contents of this Relationship Summary or would like to request a copy, please contact us via email at info@hunterlewisllc.com or call 434-996-0370.

To report a problem to the SEC, visit investor.gov or call the SEC’s toll-free investor assistance line at (800) 732-0330. If you have a problem with your investments, account, or financial professional, contact us in writing at contact@hunterlewisllc.com.

Conversation Starters: Questions you may want to discuss with your Financial Adviser –

- **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?**

