

<p><b>Item 1: Introduction</b></p>	<p>StrategicPoint Investment Advisors, LLC (“SPIA”) is registered with the United States Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences between them. Free and simple tools are available to research firms and financial professionals at <a href="https://investor.gov/CRS">Investor.gov/CRS</a>, which also provides educational materials about broker-dealers, investment advisers, and investing.</p>
<p><b>Item 2: What investment services and advice can you provide me?</b></p> <p><u>Conversation Starters. Ask your financial professional</u>  <i>“Given my financial situation, should I choose an investment advisory service? Why or why not?”</i>  <i>“How will you choose investments to recommend to me?”</i>  <i>“What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?”</i></p>	<p>We offer investment advisory services to retail investors. We primarily provide proactive investment management services that include asset allocation, security selection, broker-dealer and custodial recommendations and ongoing portfolio management for your retirement and non-retirement accounts. As part of our investment management services, we offer unlimited access to a SPIA financial advisor, general financial planning and a customized web portal for investment performance and account reporting. We invest your assets in accordance with models we have designed to meet your risk tolerance. Our clients are typically invested in exchange traded funds, mutual funds, commodities, or other alternative investments. If you utilize our investment management services, you will typically give us discretionary authority to trade the assets in your account through a limited power of attorney contained in your client agreement with us. We will monitor the holdings and performance of the investments we make for you on an ongoing basis and review your account with you at least annually. We generally require a minimum of \$250,000 of assets under management for each client relationship but reserve the discretion to waive the minimum on a case-by-case basis.</p> <p>In addition to investment management services, we offer financial planning and consulting services on a standalone basis. When we provide financial planning or consulting services as a standalone service, we do not take discretion over your investments or monitor the holdings and performance of your investments on an ongoing basis.</p> <p>For additional information, please refer to our <a href="#">ADV Part 2A brochure</a> (“Brochure”), especially <a href="#">Item 4</a> (Advisory Business), <a href="#">Item 7</a> (Types of Clients), <a href="#">Item 13</a> (Review of Accounts) and <a href="#">Item 16</a> (Investment Discretion).</p>
<p><b>Item 3: What fees will I pay?</b></p> <p><u>Conversation Starters. Ask your financial professional</u> <i>“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?”</i></p>	<p>For our investment management services, we charge an investment management services fee, payable on a quarterly basis in arrears, which is based on a percentage of the value of the assets in your managed portfolio account. The more assets there are in your account and the higher the value of those assets, the more you will pay in fees. For our financial planning and consulting services, we charge a fixed fee based on the estimated hours to complete the project, times our hourly rate.</p> <p>In addition to our investment management services fees, you will be responsible for other fees and expenses associated with the investment of your assets. These fees and expenses could potentially include brokerage and other transaction costs, and fees and taxes, related to the purchase and sale of securities for your accounts, and any fees charged by custodians for holding your assets. Certain investments we select for you that are managed or sponsored by third parties, such as mutual funds, exchange traded funds and alternative investments, bear fees and expenses for their management and operation. For additional information, please refer to <a href="#">Item 5</a> (Fees and Compensation) of our Brochure.</p> <p><i>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.</i></p>
<p><b>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?</b></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 you. Here are some examples to help you understand what this means:</p>

<p><u>Conversation Starters. Ask your financial professional</u>  “How might your conflicts of interest affect me, and how will you address them?”</p>	<p>We receive certain benefits from the custodian we recommend to hold your account assets, such as pricing information and market data, computer software and other technology that provide access to client account data, and related support. You should be aware that our receipt of certain benefits from Fidelity creates a conflict of interest since these benefits may influence our recommendation of Fidelity over another financial institution that does not furnish similar software, systems support or services. For additional information, please refer to <u>Item 12</u> (Brokerage Practices) of our Brochure.</p> <p>Our affiliate StrategicPoint Insurance Services (“SPIS”) is a licensed insurance producer which provides insurance review and consultation services and products. The principal executive officers and other employees of SPIA, in their individual capacities, act as agents for various insurance companies, and receive customary compensation for the sale of insurance products to you. The receipt of compensation for the sale of insurance products presents a conflict of interest because the compensation provides an incentive to recommend insurance for the purpose of being compensated rather than solely based on your needs. We address this conflict through disclosure and seek to recommend insurance products only when we reasonably believe that our recommendations are in your best interest. For additional information, please refer to <u>Item 10</u> (Other Financial Industry Activities and Associations) of our Brochure.</p>
<p><b>How do your financial professionals make money?</b></p>	<p>Our firm’s financial professionals are compensated through salary and bonus or a share of the firm’s profits. A portion of that compensation is correlated to the amount of client assets they service, the revenue our firm earns from our financial services and/or whether the financial professional has been successful in increasing the amount of client assets under the firm’s management. Some financial professionals may be compensated by our indirect parent company, Focus Financial Partners, LLC (or one of its affiliates), based on our firm’s revenues or earnings. This gives the financial professional an incentive to encourage you to increase the size of your investment account and to maintain your investment account with us. For additional information, please refer to <u>Item 5</u> (Additional Compensation) of your financial professional’s ADV Part 2B Brochure Supplement. Compensation of our firm’s financial professionals is unrelated to the type of product client assets are invested in.</p>
<p><b>Item 4: Do you or your financial professionals have legal or disciplinary history?</b></p> <p><u>Conversation Starters. Ask your financial professional</u>  <i>“As a financial professional, do you have any disciplinary history? For what type of conduct?”</i></p>	<p>No. You can go to <a href="http://Investor.gov/CRS">Investor.gov/CRS</a> for free and simple search tool to research our firm and our firm’s financial professionals.</p>
<p><b>Item 5: Additional Information</b></p> <p><u>Conversation Starters. Ask your financial professional</u>  <i>“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?”</i></p>	<p>For additional information about our investment management services, and to request a copy of our Form CRS, please contact Richard J. Anzelone, our Chief Compliance Officer, at (401) 273-1500, or via email at <a href="mailto:ranzelone@strategicpoint.com">ranzelone@strategicpoint.com</a>.</p>

## EXHIBIT 1

### FORM CRS – SUMMARY OF MATERIAL CHANGES

The material changes in this Form CRS – Client Relationship Summary from the version filed by StrategicPoint Investment Advisors, LLC on June 30, 2020 are described below for each applicable section.

**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?**

Updated to delete the information regarding our soft dollar agreement with Fidelity. The following sentence has been deleted:

We have a soft dollar arrangement with the custodian, pursuant to which the custodian provides us with a credit to pay for our independent research costs.

Updated to delete the word “economic” and replace with the word “certain” in the following sentence:

You should be aware that our receipt of economic benefits from Fidelity creates a conflict of interest since these benefits may influence our recommendation of Fidelity over another financial institution that does not furnish similar software, systems support or services.