

TOLSMA INVESTMENTS, LLC

FORM ADV PART 3 RELATIONSHIP SUMMARY

1. INTRODUCTION

Tolsma Investments, LLC (“Tolsma”, “we”, “our”) is a federally registered investment adviser with the United States Securities and Exchange Commission (SEC) domiciled in the state of Washington. Mr. Jeffrey Tolsma is the Founder, Managing Director, and Chief Compliance officer and has been providing investment advisory services since 2017. Free and simple tools are available to research firms and financial professionals at <https://investor.gov/CRS>, which also provides educational materials about broker-dealers, investment advisers, and investing.

2. RELATIONSHIPS AND SERVICES

What investment services and advice can you provide me?

Our firm provides its clients with advice on key topics such as cash flow and budgeting, investing, funding a college education, retirement planning, and risk management, estate planning, among others on a non-discretionary basis. We also provide educational workshops involving a broad range of financial planning and investing topics.

An initial interview is conducted to discuss your current situation, goals, and the scope of services that may be provided to you. Our wealth planning engagements can be as broad-based or narrowly focused as you desire. During or prior to this meeting you will be provided with our Form ADV Part 2 firm brochure that includes a statement involving our privacy policy.

This review is a standard part of the fixed fee you pay. You are responsible to inform us of any changes in your investment objectives and/or financial situation.

Please see Item 4 and Item 7 in our Form ADV Part 2 for additional details.

Questions to ask your 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 qualification?*
- *What do these qualifications mean?*

3. FEES, COSTS, CONFLICTS, AND STANDARD OF CONDUCT

What fees will I pay?

We charge fees on a fixed schedule depending on the level of service you choose. Retainer fee engagements cost \$2,500 per year, project-based engagements cost \$500 per plan, and hourly engagements are charged an hourly rate of \$200 per hour, billed in 10-minute increments. Custodial fees charged are not included in your fee.

You will also pay costs associated with buying and selling securities, such as mutual fund and exchange traded fund expenses, and other possible fees. Your broker may pass along certain transactional costs associated with acting as custodian for your account. 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.

Please see Item 5.E in our ADV Part 1 and Item 5 of our ADV Part 2 for further details about fees and expenses.

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 interests ahead of yours. Tolsma is not affiliated with any other investment adviser, or broker dealer and exclusively manages assets on a non-discretionary basis. As a result, we do not receive commissions or additional fees of any kind based on the investment advice we provide you. Tolsma prides itself on eliminating any conflicts of interest so as to provide you with the best investment advice possible.

How do your financial professionals make money?

Jeff Tolsma is compensated by the fees he charges you for investment advice.

Questions to ask your professional:

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

4. DISCIPLINARY HISTORY

*Do you or your financial professionals have legal or disciplinary history?
As a financial professional, do you have any disciplinary history? For what type of conduct?*

No. Visit <https://investor.gov/CRS> for a free and simple search tool to research our financial professionals.

5. ADDITIONAL INFORMATION

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?

For up-to-date information or to request a current copy of Form CRS, contact Jeff Tolsma, Chief Compliance Officer, at 425-458-3999 or jeff@tolsmainvestments.com.