



Customer Relationship Summary - Form CRS

Introduction

Jaffe Tilchin Investment Partners, LLC ("Jaffe Tilchin") is an investment advisor registered with the Securities and Exchange Commission ("SEC"). Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free and simple sources and tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

Jaffe Tilchin offers Portfolio Management Services and Financial Planning Services, where we serve as an investment consultant for 401(k) plans, 403(b) plans, Defined Contribution Plans, Defined Benefit Plans, Cash Management Accounts, Non-Qualified Deferred Comp Plans, and Endowments and Foundations. While we maintain a wrap fee program for legacy clients, we no longer offer this for incoming clients.

Monitoring: All client accounts are monitored on an ongoing continuous basis with a formal review conducted at least annually or as agreed upon with individual clients. The reviews focus on the consistency of portfolio investments with each client's particular circumstances.

Investment Authority: Our firm provides discretionary and non-discretionary investment for our portfolio management services. If you invest with us on a discretionary basis, we will buy and sell investments in your accounts without requiring your pre-approval on an ongoing basis until you notify us in writing to terminate the agreement. If you invest with us on a non-discretionary basis, you make the ultimate decision regarding the purchase or sale of investments.

Limited Investment Offerings: You may impose any reasonable restrictions upon the manner in which we manage your investment account. For example, you may restrict the management of your account to certain types of investment products or investment strategies.

Account Minimums and Other Requirements: We do not maintain an account minimum requirement.

For additional information including minimum investment amounts, please see

<https://adviserinfo.sec.gov/firm/summary/143608> for our Form ADV, 2A brochure (specifically, Items 4 and 7 of Part 2A).

Conversation starters. 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?

For portfolio management services, we charge a maximum fee of 2% based upon the dollar amount of assets under management for portfolio management. These fees are assessed quarterly in advance. All fees are negotiable at our sole discretion.

Fees for financial planning services are charged on a fixed-fee basis. The amount you will be charged will be negotiated between you and Jaffe Tilchin. Generally, the amount of our fees will depend upon the complexity of the services you need. Fixed fees may range from \$1,000 to \$40,000 per plan. We will provide you with an estimate of the cost of the services to be provided to you prior to beginning the financial planning process.

Description of Other Fees and Costs: There are other fees and costs related to our investment advisory services and investments in addition to the principal fees and costs listed above that you will pay directly or indirectly. Examples of the most common fees and costs associated with client accounts could include custodian fees, account maintenance fees, mutual fund fees and other transactional fees and product-level fees. Our firm does not receive any portion of these fees.

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 more detailed information about our fees and costs please review our Form ADV, Part 2A brochure (specifically Item 5), which can be found at <https://adviserinfo.sec.gov/firm/summary/143608>.

Conversation starters. Ask your financial professional:

– 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?

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 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. Below are examples to help you understand what this means.

- Recommending rollovers from retirement plan assets such as 401(k) accounts to an Individual Retirement Account (“IRA”) that is advised by our firm can increase the amount of advisory fees you will pay.
- Recommending proprietary Exchange Traded Funds from one or more of the trust companies we utilize, which presents a potential conflict of interest because we also receive services from those companies that are beneficial to us.
- Some of our financial professionals are licensed as insurance agents or dually registered with APW Capital, Inc., a registered broker-dealer (member FINRA/SIPC). In addition to our services, your financial professional may recommend insurance or securities products in their separate capacity as an insurance agent or a registered representative of a APW Capital, Inc. The fees charged for insurance and securities products are separate from our advisory fees, where your financial professional may earn commission-based compensation for the implementation of the product. Therefore, there is a financial incentive to recommend insurance and securities products through our financial professionals. You are under no obligation to purchase or sell insurance products or securities through your advisory representative.
- We are also an adviser to a private investment pool, 3D Tech Plus, LLC (“Fund”). We have a conflict of interest in recommending investments in the Fund because we are compensated based on the assets under management of the Fund. The fees for these Fund are disclosed in the prospectus or offering documents of the respective Fund.

Additional information: For more detailed information, please review our Form ADV, Part 2A brochure (specifically Items 10 and 11) which can be found at <https://adviserinfo.sec.gov/firm/summary/143608>.

Conversation starters. Ask your financial professional:

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

How do your financial professionals make money?

Our principals share in the net profits of the firm. Our financial professionals are paid a percentage of the advisory fees the firm receives. Accordingly, they have the opportunity to earn more by increasing assets and investing in riskier investments to increase their overall performance, provided the firm’s revenue exceeds its expenses.

As stated above, some of our investment adviser representatives are also registered representatives of APW Capital, Inc. (“APW”) or licensed as insurance agents. Your investment adviser representative may recommend brokerage services through APW, insurance products through their individual capacity, or investment advisory services through us. Brokerage services and investment advisory services are different, and the fees we, and APW, charge for those services are different. It is important that you understand the differences. At times, your investment adviser representative earns transaction-based compensation and has additional conflicts of interest as a result of providing brokerage services through APW. You are encouraged to learn more about APW by reviewing www.aurorapw.com/distinctions.php and having a discussion with your investment adviser representative. We typically only recommend investment advisory services to our clients, and at times we use broker-dealer APW Capital, Inc. for (a) smaller accounts; (b) for legacy business; or (c) selling certain securities to our clients including variable annuities.

Do you or your financial professionals have any legal or disciplinary history?

Our firm has no disciplinary history, however some of our representatives have disciplinary history addressed in their individual Form ADV, Part 2B Brochure Supplements (specifically Item 9). Visit Investor.gov/CRS for a free and simple search tool to research your financial professionals.

Conversation Starters. Ask your financial professional:

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

Additional Information

For additional information on our investment advisory services and to request an up-to-date copy of this Customer Relationship Summary, go to IAPD at <https://adviserinfo.sec.gov/firm/summary/143608>, visit www.jaffetilchininvestments.com; email info@jaffetilchin.com, or call us at 813-963-2500.

Conversation starters. 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?