

Lynx Investment Advisory, LLC
 FORM CRS – CUSTOMER RELATIONSHIP SUMMARY
 March 31, 2022

<p>Item 1. <u>Introduction</u></p>	<p>Lynx Investment Advisory, LLC (“Lynx”) 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 adviser, and investing.</p>
<p>Item 2. <u>Relationships and Services</u></p>	<p>What investment services and advice can you provide me?</p> <p>We provide investment consulting services to individual and institutional clients. Individual clients include high-net worth individuals, family offices and/or trust accounts. Our institutional clients include endowments, foundations, other non-profits and retirement plans.</p> <p style="text-align: center;">Monitoring</p> <p>We provide customized investment recommendations based on each client’s unique circumstances. Client portfolios are continually monitored, reviewed and analyzed by each client’s advisor. Clients receive a performance report prepared by Lynx on a quarterly basis.</p> <p style="text-align: center;">Investment Authority</p> <p>Certain clients have chosen to have their investments managed on a discretionary basis, which means Lynx may buy or sell investments without pre-approval from the client. Alternatively, clients can choose a non-discretionary relationship in which Lynx seeks approval from the client to make any recommended portfolio changes.</p> <p>In both cases, we accept discretion of client accounts when cash needs to be raised for checks that clients have written on an account or to pay our advisor fees. In these cases, we will not seek permission from the client before we trade a security. This trading authority may be granted to us by clients in their account opening documents.</p> <p style="text-align: center;">Limited Investment Offering</p> <p>While a client’s financial goals, objectives and constraints are considered when creating an asset allocation and making initial and ongoing investment recommendations for a client, Lynx does not directly provide other financial planning services such as estate planning and insurance. Lynx has one proprietary fund. If it is recommended, we also present clients with alternatives within the same asset class space.</p> <p style="text-align: center;">Account Minimums and Other Requirements</p> <p>While Lynx does not have established account minimums and accounts are reviewed and accepted at our discretion, most accounts are at or above \$1 million.</p> <p>More information about Lynx’s services are available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/111814.</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. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p>	<p>A. What fees will I pay?</p> <p>Lynx’s standard advisory fees are based on assets under management using the schedule below:</p> <ul style="list-style-type: none"> 1.00% per year on the first \$1,000,000 .75% per year on the first \$5,000,000 .60% per year on the next \$4,000,000 .50% per year on the next \$20,000,000 Negotiable on assets above \$40,000,000 <p>Fees are generally paid quarterly, in advance, based on the value of the client’s account as of the close of the previous business quarter, unless otherwise negotiated with the client and provided for in their contract.</p> <p>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/111814.</p>

