

**Matrix Capital Advisors, LLC**  
Form CRS Customer Relationship Summary  
06/30/2020

### Item 1: Introduction

Matrix Capital Advisors, LLC is registered with the 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. The SEC offers free and simple tools to research firms and financial professionals at [www.investor.gov/CRS](http://www.investor.gov/CRS) which also provides information tailored to educate retail investors about financial professionals.

### Item 2: Relationships and Services

#### What investment services and advice can you provide me?

**Services:** We provide fee-based, separate account investment advisory services to individuals, high net worth individuals, trusts, and charitable organizations. Our firm does not engage in any business activities other than fee-based investment advisory services.

**Monitoring:** We offer you advice on a regular basis as part of our standard service. We develop an Investment Policy Statement with you, incorporating your goals and objectives, and regularly monitor your account. When we become aware of any significant changes in the market or your situation we will adjust our strategy accordingly.

**Investment Authority:** Our firm will buy and sell investments in your accounts without requiring your pre-approval on an ongoing basis. This is called "discretionary authority".

**Account Minimums:** Matrix Capital Advisors typically requires a minimum investment of \$3,000,000. This minimum is negotiable at our discretion.

**Additional Information:** For additional information regarding services and fees please visit <https://matrixcapital.com/compliance/> for our Form ADV 2A Brochure.

#### *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?*

### Item 3: Fees, Costs, Conflicts and Standard of Conduct

#### What fees will I pay?

**Fees and Costs:** You will pay an ongoing, mutually agreed upon fee on a quarterly basis based on the value of cash and investments in your advisory account. If our firm charges you asset based fees, more assets in the account will cause you to pay more in fees and therefore we may have an incentive to encourage you to increase the amount of money invested in those accounts. We reserve the right to negotiate fee arrangements for clients at our sole discretion. Matrix Capital Advisors charges no other fees or costs related to services.

**Other Fees and Costs:** You are responsible for all custodial and securities broker-dealer execution fees charged by the custodian. Our asset-based fee is separate and distinct from the custodian and broker-dealer execution fees.

#### Additional Information:

**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 which can be found at <https://matrixcapital.com/compliance/>.**

**Conversation starters.** We encourage you to 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.

**Potential Conflicts:**

The more assets there are in your advisory account, the more you will pay in fees, and the firm may therefore have an incentive to encourage you to increase the assets in your account.

The Managing Directors of Matrix Capital Advisors may receive performance-based fees for a number of private investments. These arrangements are disclosed in our Form ADV, Part 2A Brochure, Item 6.

**Conversation starters.** We encourage you to ask your financial professional:

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

**Additional Information:**

For more detailed information about our fees and costs please review our Form ADV, Part 2A Brochure which can be found at <https://matrixcapital.com/compliance/>.

**How do your financial professionals make money?**

Our financial professionals are compensated based on an agreed upon annual salary and bonus structure. Employees also participate in a non-contributory Profit Sharing Plan.

**Item 4: Disciplinary History**

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

Neither the firm nor any of our financial professionals have any legal or disciplinary history. Visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research our firm and our financial professionals.

**Conversation starters.** We encourage you to ask your financial professional:

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

**Item 5: Additional Information**

You can find additional information about our services by visiting <https://matrixcapital.com/>; emailing Kim Lundgren, Chief Compliance Officer, at [klundgren@matrixcapital.com](mailto:klundgren@matrixcapital.com) or calling us at 312-612-6100.

The firm's Managing Directors are listed below and are available if you have any questions.

Christopher Burke  
[cburke@matrixcapital.com](mailto:cburke@matrixcapital.com)  
(312) 612-6110

Michael Wik  
[mwik@matrixcapital.com](mailto:mwik@matrixcapital.com)  
(312) 612-6111

**Conversation starters.** We encourage you to 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?