INTRODUCTION

Since 1987, clients have entrusted Alexandria Capital to chart their paths forward. Every aspect of our organizational design reflects our client-first philosophy. We are a “fiduciary” investment and wealth advisor registered with the Securities and Exchange Commission. Clients should understand that the services we provide and fees we charge are different than those of a broker-dealer, and that it is important to understand the differences between the two. Free and simple tools are available to research firms and financial professionals at www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisors, and investing.

What types of investment services and advice can you provide me?

Our Services & Authority. Alexandria is a diversified financial services company offering investment management, private wealth advisory services, financial planning, and other related services to retail investors like you, and to institutional investors. You may choose comprehensive services or an a la carte selection. We usually manage accounts on a discretionary basis. This means you authorize us to perform various functions, on your behalf and at your cost, without further approval. Our discretion is limited and must be used consistent with your goals and limitations. Examples include selecting the type or amount of securities to be bought or sold, or the executing broker used and the amount of commission paid. With non-discretionary services, we would need your approval before transacting in your account. Regardless of your choice, we do not limit your investments to only Alexandria’s recommendations.

Monitoring & Account Minimums. Your assigned relationship manager monitors your accounts on a continuous basis and provides you quarterly reports, at no additional charge. Some of our services have minimum Assets Under Management (“AUM”) requirements, ranging from $500,000 to $3,000,000. In some instances, we may accept lower account minimums. You can find more information under the headings “Advisory Business”, “Types of Clients”, and “Fees & Compensation” in our Form ADV and our Firm Brochure also available online at our website www.alexandriacapital.com.

What fees will I pay?

Principal Fees. We charge annual fees ranging from 0.65% to 1.50% of AUM, and billed quarterly in advance or in arrears, as agreed in our advisory agreement. Your fee reflects the size, investment and service complexity, and composition of your account. The more assets there are in your 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. 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. We will discuss the impact of fees with you, and encourage you to ask any questions you have. A la carte services may have hourly or other fee structures.

Other Fees. Additionally, you typically will pay other costs and charges in connection with your account or
You can find more information under the headings “Code of Ethics” and “Brokerage Practices” in our Form ADV and our Firm Brochure also available at www.alexandriacapital.com.

**Conversation Starters:**

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

How do your financial professionals make money?

Our advisers are employees and are paid a fixed monthly salary and eligible for discretionary and new client bonuses based on revenue. This does create a potential conflict by incentivizing employees to encourage you to invest more.

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

No, our firm and/or financial professionals do not have any legal and disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

**Conversation Starters:**

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

Additional Information

You can find additional information about our firm’s investment advisory services on the SEC’s website at www.adviserinfo.sec.gov by searching CRD #129120. You may also contact our firm at 202-391-0170 to request a copy of our Relationship Summary and talk to any one of our professionals or support staff.

**Conversation Starters:**

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?