Item 1: Introduction

Moody Aldrich Partners, LLC ("MAP") 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 these differences. Free and simple tools are available to research firm and financial professionals at www.Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me?

MAP provides investment advisory services to retail investors ("clients") through separately managed accounts ("SMA") or as a sub-adviser to wrap and non-wrap programs offered by other advisers. Advisory services are delivered through discretionary portfolio management, and clients may select one or more of MAP's investment strategies or products. MAP does not provide you and its clients with assistance in selecting or monitoring the investment strategies that are most appropriate for their financial situation, goals, experience, investment objectives, and risk tolerance as part of the advisory relationship. Clients, alone or with their investment consultant/adviser, are responsible for evaluating MAP's strategies in light of their individual financial circumstances, objectives, and investment policies. MAP will monitor your investments on a continuous and discretionary basis, and each separate account in a strategy will be managed similarly. However, you have the opportunity to place reasonable restrictions or constraints regarding specific conditions or limitations on the types of investments to be made for your account. MAP offers clients various equity strategies, including those of its Eastern Shore Capital Management ("ESCM"), Global Value Advisors ("GVA"), and MAP Portfolio Solutions Group ("PSG") divisions.

FOR ADDITIONAL INFORMATION REGARDING OUR SERVICES, PLEASE SEE ITEMS 4 & 7 OF OUR *Form ADV Part 2A*.

Ask us the following questions: 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?

For providing investment advisory services to clients, MAP charges an annualized fee as a percentage of assets under management. Our standard fees vary depending on the strategy selected and may be negotiable under certain circumstances. They are as follows:

MAP Strategy	Fee per Annum
ESCM	up to 0.90%
GVA	up to 1.00%
PSG	up to 1.00%

In accordance with the terms of our agreement with you, we typically bill investment advisory fees quarterly, either in advance or in arrears, based on the value of your account at the end of each calendar quarter. You may elect to be billed directly, or you may authorize us to invoice the custodian for payment directly from your account. You are also responsible for certain charges imposed by custodians, brokers, and other third parties, such as custodial fees, and other fees and taxes on brokerage accounts and securities transactions, such as commissions and transaction fees. Investments in shares of mutual funds or ETFs will pay both a management

fee to MAP and also fees and expenses to the mutual fund or ETF. For clients that invest via a Wrap Program (or similar), you generally pay an all-inclusive asset-based fee to the Wrap Program Sponsor that will be higher than a typical asset-based advisory fee. The benefit is that transaction costs, brokerage commissions, and/or custodian fees, when trades are directed through the Wrap Sponsor, will be included in your SMA Wrap Fee. However, there may be times when MAP may place trades with a Broker other than the Sponsor, which would result in you paying additional fees related to having a brokerage account, including brokerage commissions, transaction fees, fees charged by managers other than MAP, custodial fees, and other transactional or product-level fees. Additional details can be found in Item 12 – Brokerage Practices in our Form ADV Part 2A.

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.

Ask us the following questions: **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 when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?**

FOR ADDITIONAL INFORMATION REGARDING OUR FEES, PLEASE SEE ITEM 5 OF OUR Form ADV Part 2A.

When MAP acts as your investment adviser, we must act in your best interest and not put our interests ahead of yours. At the same time, the way MAP makes money can create some conflicts with your interests. You should understand and ask MAP or your investment consultant/adviser about these conflicts because they can affect the investment advice MAP provides you. For example, MAP charges an investment advisory fee based on the assets managed, and the more assets in your account, the more you will pay in fees. MAP, and/or your investment consultant/adviser, whether affiliated or non-affiliated with us, has an incentive to recommend adding assets to an account.

FOR ADDITIONAL INFORMATION REGARDING MAP'S CONFLICTS, PLEASE SEE ITEMS 10 AND 11 OF OUR Form ADV Part 2A

Ask us the following questions: **How might your conflicts of interest affect me, and how will you address them? How do your financial professionals make money?**

MAP pays our financial professionals from the fees we collect from you.

Item 4: Disciplinary History

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

No. Please go to Investor.gov/CRS for a free and simple search tool to research our financial professionals.

Ask us the following questions: **As a financial professional, do you have any disciplinary history? For what type of conduct?**

Item 5: Additional Information

For additional information regarding MAP's fees, services, and conflicts, please see MAP's **Form ADV Part 2A** *(Full link:* https://adviserinfo.sec.gov/firm/summary/106920, or visit MAP's website at https://moodyaldrich.com.

Please contact MAP at 781-639-2750 for more up-to-date information or request a copy of this client relationship summary.

Ask us the following questions: **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?**