

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 does not generally offer its investment services directly to any retail investor. However, MAP does provide investment advisory services to retail investors in the form of discretionary portfolio management through intermediaries for both single (Wrap Fee Program) and dual contract (separately managed accounts (“SMA”) advisory and sub-advisory services) arrangements. In all instances, the retail investors are advised by an investment consultant/adviser. Each retail investor has the opportunity to select, typically in consultation with its investment consultant/adviser, one or more of MAP’s investment strategies. As such, it is incumbent on the investment consultant/advisor to establish goals and objectives, develop a client’s personal investment policy, monitor and review those goals and objectives on a routine basis, and create and manage a portfolio based on that policy on the individual needs of the client.

MAP, primarily through its Eastern Shore Capital Management (“ESCM”) and Global Value Advisors (“GVA”) divisions, offers retail clients long-only U.S. Small and Smid Cap strategies as well as long-only global value strategies on a discretionary basis. Generally, the minimum investment required is negotiable.

FOR ADDITIONAL INFORMATION REGARDING OUR SERVICES, PLEASE SEE ITEMS 4 AND 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 Portfolio Management Services to retail investors in either **SMA Sub-Advisory** or **SMA Wrap Program** arrangements, MAP charges an annualized fee for this service as a percentage of assets under management (“AUM”). For both arrangements, MAP charges a standard fee from 0.70% to 1.00% per annum of assets managed and are subject to negotiation. The decision to select either arrangement is made by your investment consultant/adviser who can provide an explanation of how the fees and costs might affect your investments. Unless by prior arrangement, investment advisory fees are billed quarterly in arrears calculated based on the closing market value of the account on the last business day of the calendar quarter. Fees are prorated for the period if investment advisory services commence other than on the first day of such quarter or terminate other than on the last day of such quarter. You may elect to be billed directly or you may authorize us to invoice the custodian for payment direct from your account. MAP’s management fees are exclusive of brokerage commissions, transaction fees, and other related costs and expenses. However, you may incur 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. For retail clients in an SMA Wrap Program, 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.

The more assets in your account, the more you will pay in 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.

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, MAP puts your best interest ahead of ours. At the same time, the way MAP makes money can create some conflicts with your interests. You should understand and ask MAP about these conflicts because they can affect the investment advice MAP provides you. The following is an example to help you understand what this means. MAP charges an investment advisory fee based on the assets managed. Your investment consultant/adviser has an incentive to recommend adding assets to an account. The more assets in your account, the more you will pay in fees.

FOR ADDITIONAL INFORMATION REGARDING MAP'S CONFLICTS, PLEASE SEE ITEM 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](https://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](tel: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?