

03/31/2024

Client Relationship Summary (“CRS”)

Jasmijn Capital Management, LLC.
5917 W 10925 N, Highland, Utah 84003

Registered with various states as an Investment Advisor. There are different ways you can get help with your investments. You should carefully consider which types of accounts and services are right for you. We are an investment adviser and provide advisory accounts and services rather than brokerage accounts and services. This document gives you a summary of the types of services we provide and how you pay. Please ask us for more information. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing. *“What investment services and advice can you provide me?”*

Item 2: Relationships and Services: We specialize in the following services: Jasmijn Capital Wealth Management Platform – Advisor Managed Portfolios.

Investment Management: The Wealth Management Platform – Advisor Managed Portfolios Program (“Advisor Managed Portfolios”) provides comprehensive investment management of your assets through asset allocation planning software as well as execution, clearing and custodial services through Axos Financial Corporation (“Axos”). Please refer to our ADV Part 2 Item 4 for information on *Referrals to Third Party Money Managers*

Investment Management Clients: We review accounts periodically, but no less than annually, for our clients subscribing to the following services: Jasmijn Capital Wealth Management Platform. The nature of these reviews is to ascertain whether clients’ accounts follow their investment objectives, are appropriately positioned based on market conditions, and investment policies, if applicable.

Investment Authority: We accept discretion over asset management accounts. In order for us to have discretionary authority, our clients must sign an investment advisory agreement that states discretionary authority will be limited to type and amount of securities purchased or sold in client accounts. Adviser shall have limited power of attorney to direct, manage, change, and reinvestment of all assets in the Account, and to take other action with respect to the accounts, without prior permission from client. Limited Investment Offerings: We generally discourage clients from imposing restrictions on investing in certain securities or types of securities due to the level of difficulty this would entail in managing their account. In the instance that we incur restrictions, it would be limited to the following services: Jasmijn Capital Wealth Management Platform.

Account Minimums and Other Requirements: We generally require a minimum aggregate account balance of \$50,000 for our JCM account service.

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Questions to ask your advisor: “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?” “What fees will I pay?”

Item 3: Fees: Our Advisor Managed Portfolios account maximum fee schedule is as follows: Jasmijn Capital Wealth Management Fee: From \$0 to \$750,000 -Up to 1.95%; \$750,001 to \$1,250,000 Up to 1.75%; \$1,250,001 to \$2,000,000 Up to 1.50%; \$2,000,001 to \$25,000,000 Up to 1.25%; \$25,000,001 + Up to 0.80%. In this program, all fees, to include any brokerage fees and commissions, with the exception of the paper delivery statement fee, account closure fee, and trustee fee for qualified accounts, are absorbed by the Custodian.

Question to Ask Advisor? “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. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice, we provide you. Here are some examples to help you understand what this means.”

Examples of Ways You Make Money and Conflicts of Interest: We receive commissions for the sale of life insurance products. Please refer to Item 5 of our ADV Part 2A Brochure for more information. Question to ask advisors: “How might your conflicts of interest affect me, and how will you address them?” “How do your financial professionals make money?”

Item 4 – Disciplinary History: “Do you or your financial professionals have legal or disciplinary history?” Yes. In 2000, David Melling had an arbitration complaint filed by a customer. That complaint was settled in 2001. In addition, Due to an administrative mistake, the Firm was conducting business in Maryland without filing the proper paperwork. This resulted in a small fine being awarded to the state of Maryland. Please visit Investor.gov/CRS for a free and simple search tool to research you and your financial professionals.

Questions to Ask Advisor: “As a financial professional, do you have any disciplinary history? For what type of conduct?”

Item 5 – Additional Information: This *Client Relationship Summary* (“Form CRS/ADV Part 3”) brochure provides information about the qualifications and business practices of Jasmijn Capital Management, LLC. If you have any questions about the contents of this brochure, please contact us at: davemelling@Agilecapitalmanagement.com if you would like to receive up-to-date information about our advisory service and/or to request the latest copy of this summary. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Registration with any state does not imply a certain level of skill or training. Additional information about Jasmijn Capital Management) also is available on the SEC’s website at www.adviserinfo.sec.gov.

Questions to Ask Advisor: “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?”