MEDIATE FINANCIAL INVESTMENT ADVISORY SERVICES, LLC - RELATIONSHIP SUMMARY

Introduction

Mediate Financial Investment Advisory Services, 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 retail investors to understand the differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

Relationships and Services

What investment services and advice can you provide me?

We offer investment advisory services to individuals, pensions and profit sharing plans, corporations and other business entities.

We offer financial planning services to evaluate your financial situation, goals, and risk tolerance. Through meetings and questionnaires, we gather relevant information, identify objectives and potential issues, and develop personalized recommendations across areas such as cash flow, risk management, retirement, tax and estate planning, education funding, and other needs. Services can be comprehensive or focused on specific components based on your preferences. At the end of the engagement, you will receive a written financial plan outlining our recommendations. You are not obligated to implement these recommendations or to do so through our firm. The engagement is then concluded

We offer portfolio management services to help manage your investment accounts on an ongoing basis. We work with you to understand your investment objectives, time horizon, and risk tolerance, and then build a customized portfolio using our proprietary models, including All-Assets, Greatest Hits, Cyclical Super Sector, and International Titans. With your authorization, we will have discretionary authority to make investment decisions and execute transactions on your behalf. Our recommendations are based on factors such as performance risk, fees, tax efficiency, and your individual preferences. As part of our standard services, reviews of clients' portfolios are conducted on a regular basis along with attempting to meet with clients annually to discuss and review their accounts.

We do not require a minimum account balance.

Additional Information:

You can find more detailed information about the services we offer in Item 4 of our ADV Part 2A.

Conversation Starters:

1. "Given my financial situation, should I choose an investment advisory service? Why or why not?"
2. "How will you choose investments to recommend to me?"
3. "What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?"

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

We offer our financial planning services on a fixed or hourly fee basis. For fixed fee services, our fee is $1,200. Hourly fees are assessed at a rate of $150 an hour for consulting related financial planning services. The minimum hourly planning fee is $300 and a maximum fee of $20,000. All fees for planning services are due at the time the client signs the financial planning agreement and collected by check. For prepaid fees in excess of $500.00, services will be completed within six months of the date fees are received.

Our portfolio management fee is based on a percentage of assets under management in the client's account. The fee is calculated and billed monthly in arrears. The annual management fee is 1.45%. The fees may be negotiable.

Clients may incur additional charges imposed by custodians or brokers, such as ticket charges, differed sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fun fees, and other fees and taxes on brokerage accounts and securities transactions. Mutual funds and exchange traded funds also charge internal management fees, which are disclosed in each fund's prospectus. Such charges, fees and commission are exclusive of, and in addition to, our fee and we will not receive any portion of these commissions, fees, and costs.

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. You can find more detailed information about our fees and costs in Item 5 of our Firm Brochure.

Conversation Starter:

"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:

a) Our owner and Investment Adviser Representatives are independent insurance agents and may recommend these services to clients. This other activity pays them commissions that are separate from our fees and gives our owners and advisers a financial incentive to recommend and sell insurance products to our clients.

b) When we recommend that you rollover a retirement account for us to manage, this creates a conflict of financial incentive because we charge a fee for our services.

Conversation Starter:

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

Additional Information:

You can find more detailed information about our conflicts of interest in Item 10 of our Firm Brochure.

How do your financial professionals make money?

Our financial professionals receive a salary for their services. Bonuses are paid from time to time based on our owners' discretion. Registered representatives charge a transaction-based commission each time they buy or sell a security in a brokerage account. As a result, they have an incentive to trade as much as possible to increase their compensation.

Disciplinary History

Do you or your financial professionals have legal or disciplinary history? No

Search Tool:

Visit Investor.gov/CRS for a free and simple search tool to research you and your financial professionals.

Conversation Starter:

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

Additional Information

You can find additional information about our advisory services and request a copy of our relationship summary here:

Mailing Address: 6674 Tippecanoe Rd., Suite 6, Canfield, OH 4406 Telephone: (330) 702-3556

Website: www.mediatefinancial.com

Conversation Starter: "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?"

Material Changes: We do not have any material changes to report.