Purpose Capital Management, LLC
Client Relationship Summary (CRS)
October 2, 2026

Purpose Capital Management, LLC (the "Firm", "we" or "us") is applying to register 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 firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

Purpose considers itself a multi-family office that provides investment advice, financial planning and various administrative services to members of a family and several individuals who have long-standing relationships with one or more family members. We monitor client accounts on periodic basis and also provide performance information to the clients in accordance with the agreement.

We provide non-discretionary portfolio management services to client accounts; any limitation on our authority is included in the investment management agreement. The Firm does not maintain a standard minimum account size or amount.

For more information about our services, please refer to Items 4 of our Form ADV, Part 2A (the "Brochure")

What to ask us?

- **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?

We generally charge an annual management fee based on assets under management, with fees of up to 2% per annum depending on factors such as the size of the relationship, the scope of services provided, the complexity of the affairs, and the types of assets managed. Managed assets may include, without limitation, private and alternative investments (such as direct private equity investments, venture capital investments, hedge funds, private real estate investments, private funds, co-investments, and other illiquid assets), as well as publicly traded investments (such as stocks, bonds, exchange-traded funds, mutual funds, money market funds, and other marketable securities).

In addition to management fees, certain clients will be charged a performance-based fee or carried interest allocation up to 20% of investment gains, subject to applicable laws, regulations, and the terms of the governing investment management agreement or fund documents.

We may also charge certain clients a fixed annual family office, advisory, consulting, tax, and bill pay or administrative fee. Such fees are negotiated individually with each client based on the nature and extent of the services provided.

Fees are generally payable quarterly in advance or in arrears, as specified in the applicable client agreement. Purpose will waive, include, reduce, or negotiate fees for certain clients at its discretion or as otherwise required by law.

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. For more detailed information about our fees, please refer to Item 5 and Item 6 of the ADV Part 2A (the "Brochure").

What to ask us:

- **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.

Our Firm does not receive compensation from any other person other than the Fees outlined in the Brochure. Nevertheless, conflicts of interest can be inherent in the normal operations of the Firm.

Our Firm and its supervised persons may buy or sell securities for their own personal accounts, which can create a conflict of interest because these trades may occur close in time to transactions we place for you.

Affiliates of the Firm serve as the general partners of, and the Firm serves as the investment manager of, pooled investment vehicles (each, a "Fund" and collectively the "Funds"). This creates a conflict.

We charge fees based solely on investment profits, except for certain accounts. Our compensation structure may provide additional compensation when account performance is strong. The presence of a performance-based fee structure may incentivize the investment manager to seek higher performance, which could involve higher portfolio risk. Because our compensation increases when your account performs well, we have an incentive to take greater investment risks which could lead to higher potential losses. By contrast, certain clients pay a fixed fee instead of a performance-linked fee. Because these fee types differ, the Firm's economic incentives may also differ. This may create potential conflicts.

You should understand this conflict and consider whether a performance-based fee arrangement aligns with your investment objectives and risk tolerance.
For more information regarding our conflicts of interest, and how we mitigate such conflicts, please refer to Items 6, 11 & 14 of the Brochure.

What to ask us:

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

How do your financial professionals make money?

Our financial professionals are paid a salary and discretionary bonuses based on a variety of factors including but not limited to client account performance, achievement of their key area, the Firm's AUM growth etc.

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

No, neither we nor our financial professionals have a legal or disciplinary history. Please visit Investor.gov/CRS, for a free and simple search tool to research us and our financial professionals.

What to ask us:

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

Additional information about our Firm and services is in the Brochure, available upon request.

To request a copy of this document or any other disclosure documents referenced herein, please contact us at (972)-385-4387.

What to ask us:

- **Who is my primary contact person? Is he or she a representative of an investment adviser or broker-dealer?**
- **Who can I talk to if I have concerns about how this person is treating me?**