MAXIMAI
INVESTMENT PARTNERS

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MAXIMAI INVESTMENT PARTNERS, LLC
FORM CRS

This form provides a summary of the business practices and services provided by MAXIMAI Investment Partners, LLC ("MAXIMAI"). Should you have any questions about the contents of this form please do not hesitate to contact us at (786) 332-6050. The information herein has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. The registration as an investment adviser does not imply a certain level of skill or training. Additional information about MAXIMAI, is also available on the Securities and Exchange Commission's website at www.adviserinfo.sec.gov

ITEM 1. INTRODUCTION

MAXIMAI Investment Partners, LLC is registered with the Securities and Exchange Commission as an investment adviser. We provide investment advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. MAXIMAI offers comprehensive, fee only wealth management and family office services with discretionary and non-discretionary portfolio management services to our clients and prospective clients. Discretionary accounts provide MAXIMAI the authority to make investment decisions on behalf of the client. Non-discretionary accounts, on the other hand, leave the ultimate decision regarding the purchase or sale of investments solely on the client. As an investment advisor, MAXIMAI's principal business is to provide fee-based investment advisory services. It is important for the retail investor to know that the fees paid to us and the services we provide are different from the fees and services associated with their bank or broker-dealer. MAXIMAI Investment Partners, LLC will provide investment advisory services and portfolio management services and will not provide other administrative services. At no time will MAXIMAI accept or maintain custody of a client's funds or securities.

There are available free and simple tools you may utilize to inform yourself further and research our firm and/or our financial advisors. You may do so at Investor.gov/CRS, which also provides educational material about broker-dealers, investment advisers and investing. We encourage you to use these tools before you make an investment decision.

ITEM 2. RELATIONSHIPS AND SERVICES

Q: "What investment services and advice can you provide me?"

At MAXIMAI, our team of investment professionals will evaluate your investment profile as well as your current investments and determine whether these complement each other. We will meet with you to determine your investment objectives, risk tolerance, and other relevant information at the beginning of our advisory relationship. Once we identify a risk profile, the firm will suggest and implement investment recommendations. In some cases, we may modify the model portfolio for particular clients based on the client's individual needs, financial objectives, and risk tolerance. Once we determine an appropriate strategy, we will monitor your portfolio's performance on an ongoing basis, at no cost to you. Our investment strategies and advice may vary depending upon each client's specific financial situation. As such, we determine investments and allocations based upon your predefined objectives, risk tolerance, time horizon, financial information, liquidity needs and other various suitability factors. Your restrictions and guidelines may affect the composition of your portfolio. It is important that you notify us immediately with respect to any material changes to your financial circumstances, including for example, a change in your current or expected income level, tax circumstances, or employment status. MAXIMAI has entered into a contractual relationship with Dynasty Financial Partners, LLC ("Dynasty"), which provides MAXIMAI with operational and back office support including access to a network of service providers. Through the Dynasty network of service providers, MAXIMAI may receive preferred pricing on trading technology, reporting, custody, brokerage, compliance, and other related services. MAXIMAI may also refer clients to other financial services companies and service providers, including commercial banks, as a courtesy to the client and with no compensation from the institution. MAXIMAI does not assume any responsibilities for the products and services offered by said institutions. MAXIMAI strongly recommends clients to perform their own due diligence on these institutions before opening a new account / relationship with them. MAXIMAI's cumulative minimum account is $1,000,000; however, based on facts and circumstances MAXIMAI may, at its sole discretion, accept accounts with a lower value. Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, and 8 via the following link: https://adviserinfo.sec.gov/firm/brochure/284919.

As a retail investor, you may ask us the following questions to start a conversation about relationships and services: "Given my financial situation, should I choose an investment advisory service? Why or why not?" "How will you choose investment 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

Q: What fees will I pay?

MAXIMAI Investment Partners, LLC offers advisory services for a fee that is set in and governed by the Advisory Agreement between you, as the Client, and MAXIMAI, as the Investment Advisor. Fees are paid on a quarterly basis, in arrears, based on the net asset value of the financial assets managed by the Firm as of the last business day of each month, or calculated based

on the official value of the accounts or portfolios as reported by the financial institutions that act as brokers and/or custodians for the client. The fees charged to each client are a function of the type and size of the client's portfolio. These fees range from .50% to 2.00% per annum (payable on a quarterly basis, calculated as 1/4 of the agreed upon percentage fee multiplied by the Net Asset Value of each account). These fees may be negotiated by the advisor under unusual circumstances, at the sole discretion of the advisor. Our annual portfolio management fee is billed and payable, quarterly in arrears, based on the average market value at end of billing period. If the portfolio management agreement is executed at any time other than the first day of a calendar quarter, our fees will apply on a pro rata basis, which means that the advisory fee is payable in proportion to the number of days in the quarter for which you are a client. Asset management fees will be deducted from the client's account on a quarterly basis by the broker-dealer where you have your account. We will deduct our advisory fee only when you have given our firm written authorization permitting the fees to be paid directly from your account. If you have a net worth greater than $2,200,000, you may qualify, and elect to pay, a fee based on the capital gains in your account(s), known as a "Performance Fee". Ask us about the requirements, terms and conditions applicable to Performance-based advisory fees. It is important to note that 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 detailed information, refer to our Form ADV Part 2A, Items 5 and 6 via the following link: https://adviserinfo.sec.gov/firm/brochure/284919.

Q. "What are your legal obligations to me when acting as my investment advisor? 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 interests ahead of yours. At the same time, the way we make money may create 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's an example to help you understand what this means: Performance Fees. Clients that are paying a performance-based fee should be aware that investment advisors have an incentive to invest in riskier investments when paid a performance-based fee due to the higher risk/higher reward attributes. Co-Investments: MAXIMAI or its employees, or affiliates may invest in the same private equity or alternative investments as its clients. This creates a potential conflict because MAXIMAI or its members may have interests that differ from or compete with those of clients, and/or MAXIMAI or its members may have a different exit strategy or redemption ability compared to clients.

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

To address and mitigate potential conflicts of interests, MAXIMAI has developed written policies and a Code of Ethics. We will notify you in case additional conflicts ever arise. Refer to our Form ADV Part 7A via the following link: https://adviserinfo.sec.gov/firm/brochure/284919 to help you understand what conflicts exist.

As a retail investor, you may ask a financial professional the following questions to start a conversation about the impact of fees and costs to your investments: "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?"

Q. How do your financial professionals make money?

MAXIMAI's compensation for investment professionals is based on individual arrangements with each employee. Our Advisors may receive a fixed salary, a variable compensation based on their assets under management and the advisory fees charged to our clients or a combination of both.

ITEM 4. DISCIPLINARY HISTORY

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

No, neither MAXIMAI nor any employee of the firm has been subject to any disciplinary actions by the Securities Exchange Commission (SEC) or any other regulatory entity. MAXIMAI does not have any legal issues, either pending or resolved, to disclose.

As a retail investor, you may ask a financial professional the following question to start a conversation:
As a financial professional, do you have any disciplinary history? For what type of conduct?

You can visit investor.gov/crs for a free and simple search tool to research you and your financial professionals

ITEM 5. ADDITIONAL INFORMATION

You can find additional information about your investment advisory services and request a copy of the relationship summary by contacting us at (786) 332-6050 or at info@maximaipartners.com. You can also find additional information about MAXIMAI Investment Partners on the SEC's website at www.adviserinfo.sec.gov.

As a retail investor, you may ask a financial professional the following question to start a conversation about contacts and complaints: "Who is my primary contact person? I 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?