

Conservest Capital Advisors Inc.

Customer Relationship Summary ("Form CRS")
March 27, 2024

This Form CRS provides information about the qualifications and business practices of Conservest Capital Advisors Inc. ("Conservest", "us", "we", "our"). Investment advisory services and fees differ, and it is important for you to understand the differences. We are a registered investment adviser with the SEC. This means we are compensated for our advice, not for effecting transactions in securities. 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. If you have any questions about this Form CRS, contact Patrick Chism, Conservest Chief Compliance Officer (CCO) (484) 840-3711.

What investment services and advice can you provide me?

We provide discretionary portfolio management and financial planning services to investors. Our investment and financial planning advice is based on a client's investment strategy, as well as current market conditions, which are monitored on an ongoing basis. We do not impose account minimums for our services. Our investment management services provide clients with advice and recommendations related to the structure and design of their investment portfolio. Our portfolios allocate client investable assets among mutual funds and exchange traded funds, along with individual bonds. Each portfolio is reviewed on an ongoing basis, and the investment allocation is rebalanced, if necessary, to align with the client's investment strategy and current market conditions. For more detail please see our Form ADV Part IIA ("Brochure"), specifically Items 4, 7 & 8 located at adviserinfo.sec.gov/firm/summary/111353.

Questions to ask your investment adviser: *"Given my financial situation, should I choose an investment advisory service? Why or why not?"; "How will you choose investments to recommend to me?" and "What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?"*

What fees will I pay?

Conservest charges a management fee that is based on the percentage of assets under management. The base rate is 1% of the assets managed and the rate decreases on a percentage basis as the level of assets increases. There are certain exceptions to this for clients who drop below minimum fee levels. Our current minimum fee level is \$20,000. This management fee does not include transaction costs and fees to a broker-dealer or bank that has custody of these assets, and may exceed the management fee alone. Since the fee for the managed portfolios is based on assets under management, the overall amount as a percentage of management fees will decline as your assets increase, but the dollar amount that you pay in fees will be higher since you have more assets. You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce the amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. Please also see Item 5 of our Brochure.

Questions to ask your investment adviser: *“Help me understand how these fees and costs might affect my investments. If I give you \$5,000,000 to invest, how would I calculate the yearly fee on the amount?”*

How do your financial professionals make money?

Conservest employees receive an annual salary. The salary is based on multiple factors including experience, roles, and responsibilities within Conservest. Employees may receive a bonus at the discretion of the President.

***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. Because our fees are charged as a percentage, it could be argued that our interests are aligned as, the more you make in the market, the more you will pay in fees. At the same time, the way we make money could be interpreted as conflicting with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here is an example to help you understand what this means. Because our fees are charged as a percentage, the more assets in your account, the more you will pay in fees, so we have an incentive and possibly a conflict of interest in encouraging you to increase the assets in your account. However, you ultimately decide whether to add assets to your account.

Questions to ask your investment adviser: *“How might your conflicts of interest affect me, and how will you address them?”*

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

No, Conservest and our associated financial professionals do not have any legal or disciplinary history. We encourage you to visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple search tool to research the background and history of Conservest and our associated financial professionals.

Question to ask your investment adviser: *“As a financial professional, do you have any disciplinary history? For what type of conduct?”*

Additional information about Conservest and our financial professionals can be found the SEC’s website at adviserinfo.sec.gov/firm/summary/111353. To request more information or a copy of this relationship summary please contact Patrick Chism, Conservest Chief Compliance Officer (CCO) (484) 840-3711.

Question to ask your investment adviser: *“Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who would be a secondary contact that I could speak to should I have any concerns?”*