

ROBERTSON

50
YEARS

CLIENT RELATIONSHIP SUMMARY

Form CRS

919 Milam Street, Suite 550
Houston, Texas 77002
Phone: (713) 622-4077
Effective: March 31, 2026

ITEM I:

INTRODUCTION

Robertson Investment Management, LLC is an investment adviser registered with the Securities and Exchange Commission (SEC). 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](https://www.investor.gov/crs), which also provides educational materials about broker-dealers, investment advisers, and investing.

ITEM II:

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

We offer investment advisory services to retail investors, including:

Portfolio Management Services

We provide both discretionary and non-discretionary portfolio management. In discretionary relationships, we make investment decisions on your behalf, consistent with your stated objectives. In non-discretionary accounts, we provide advice, but you make the final decisions. We may allocate your assets across liquid market solutions (e.g., stocks, bonds, funds) and illiquid alternatives (e.g., private equity, hedge funds), depending on your goals and risk profile.

Third-Party Portfolio Management

We maintain relationships with third-party managers such as Howard Capital Management and AQR Capital Management. These relationships may offer access to customized equity and derivatives portfolios that align with your overall investment strategy.

Private Client Wealth Planning

We provide tailored wealth planning for high-net-worth individuals and families, addressing asset protection, long-term goals, and estate coordination.

Corporate Finance Advisory

Our firm advises business owners and family office clients on complex transactions, including private equity, debt placement, and corporate restructuring.

Investment Consulting Services

We assist with investment policy development, asset allocation, retirement projections, tax integration, family continuity planning, and next-generation education.

Account Monitoring

We review accounts on an ongoing basis, at least quarterly, to ensure alignment with your objectives. Chase Robertson and Sonia Joao oversee all account reviews. We do not offer a limited menu of proprietary products. More detailed information is available in our Form ADV Part 2A.

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 qualifications?”

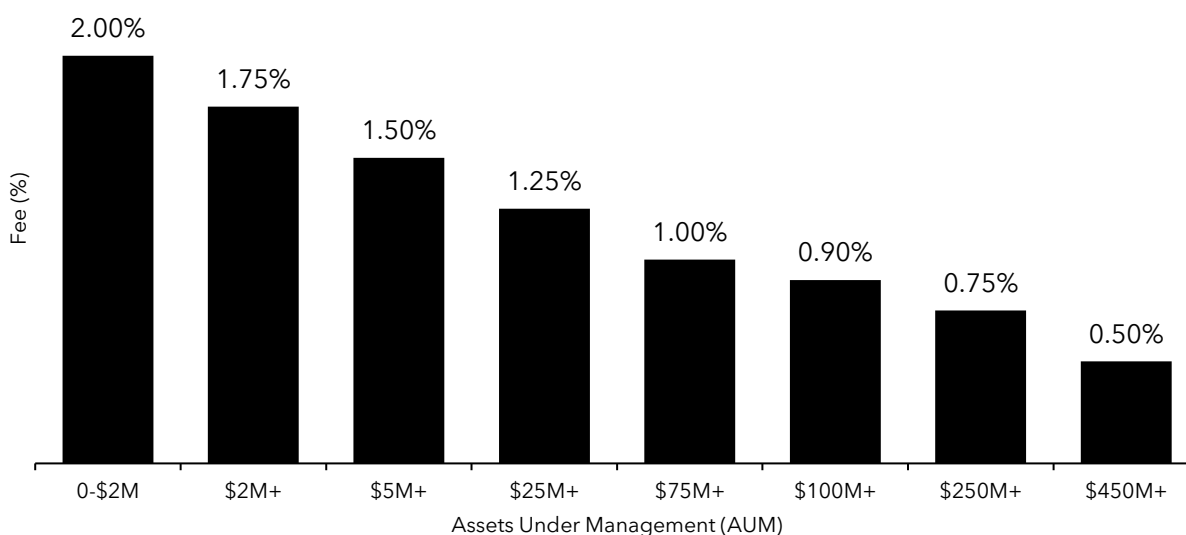
ITEM III:

WHAT FEES WILL I PAY?

Asset-Based Fees

You will pay an annual fee based on the value of your assets under management (AUM):

Annual Advisory Fees by Investment Tier



Our compensation increases as your assets increase, which creates an incentive to encourage you to grow your account.

Other Fees and Costs

In addition to our fees, you may also pay:

- Mutual fund and ETF fees (internal fund costs)
- Brokerage or custodial transaction fees
- These are separate from our advisory fee.

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?”

ITEM IV:

WHAT ARE YOUR LEGAL OBLIGATIONS TO ME AS MY INVESTMENT ADVISER?

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 creates some conflicts of interest. You should understand and ask us about these conflicts because they can affect the services and advice we provide. Our financial professionals are compensated based on the amount of assets they manage and may also earn a share of revenue from advisory services or from referrals to third-party providers.

Ask us:

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

ITEM V:

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

Some of our professionals have disclosures on file, which are public and accessible. We summarize these in our **Form ADV Part 2A Brochure** and encourage you to review them.

Ask us:

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

ITEM VI:

ADDITIONAL INFORMATION

To request additional information about our services or to obtain a copy of this relationship summary, contact:

CHASE M. ROBERTSON

Managing Partner

Phone: (713) 622-4077

Email: chase@robertsongp.com

You can also find more information about our firm by visiting www.adviserinfo.sec.gov.

Ask us:

- *“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 I am being treated?”*

Disclosures

Registration with the SEC does not imply any specific level of skill or training. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or any state securities authority.