

## Item 1: Introduction

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Form CRS: March 24, 2025

### **Alta Capital Management, LLC: Registered Investment Adviser**

Brokerage and investment advisory services and fees differ, and it is important for the retail investor (you) to understand the difference. 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 2: Relationships and Services

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### **What investment services and advice can you provide me?**

Alta Capital (we) offers investment advisory services to retail investors. We offer a variety of Equity investment portfolios for which we follow a quality growth investment discipline. In accordance with your investment objectives, your account is managed to a model as determined by our Investment Committee. Fixed Income and Balanced portfolios are also available to complement equity strategies. You can access our services through multiple financial advisory partners, wrap fee programs, and unified managed accounts (UMAs). If you have a direct service relationship with us, you are part of a non-wrap program, but if you invest with us through an intermediary financial advisory partner, you are part of a wrap program. As part of our standard investment advisory services, we monitor client account(s) on a regular basis, in addition to reviewing for portfolio model changes, changes in your investment objectives, and account deposits and withdrawals.

**Discretionary Authority:** We accept discretionary authority to manage securities accounts on your behalf. This means we buy and sell securities we determine best fit your investment objectives, in an amount and in the timeframe that we determine is appropriate. You may impose reasonable restrictions on our discretionary authority.

**Account Opening Requirements:** We require you to sign a written Investment Management Agreement which authorizes us to manage investments on your behalf. You may cancel the Investment Management Agreement at any time. If you have a direct relationship with us, account minimums are generally \$250,000 for equity accounts, \$500,000 for fixed income and balanced accounts, \$150,000 for Emerging Market accounts, and \$100,000 for Fundamental Global Equity accounts. Account minimums/fees tend to vary in wrap programs. At our discretion we may reduce the minimum account size. Follow this link for more information about our relationships and services: [www.altacapital.com/ADV2A](http://www.altacapital.com/ADV2A)

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*Conversation Starter ... Ask Alta: 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?*

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## Item 3: Fees, Costs, Conflicts, and Standard of Conduct

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### **What fees will I pay?**

We charge management fees calculated as a percentage of assets under management. Fees vary based on your specific investment program. In addition to our management fees, as a direct client, you may pay applicable commissions and custodial fees. If you invest with us through a wrap fee program, you will pay an asset-based fee which includes most transaction costs and fees to the broker-dealer or bank that has custody of these assets and will therefore pay a higher fee than a typical asset-based advisory fee. If you own mutual funds and exchange-traded funds, you also pay the operating expenses of mutual funds and exchange-traded funds, including operating expenses of any funds managed or sub-advised by our affiliates. When we serve as a model portfolio provider under UMA arrangements, we receive a fee from the program sponsor, which is negotiated based on total client account assets. The more assets we manage for you, the greater our fee and so we have an incentive to encourage you to increase account assets. The terms of your investment program will specify whether fees are billed in advance or in arrears, and whether billed directly or deducted from your account. 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 information about fees and costs, please see your Investment Management Agreement and follow this link: [www.altacapital.com/ADV2A](http://www.altacapital.com/ADV2A)

**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?**

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*Conversation Starter ... Ask Alta: 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?*

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**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. As an example, to help you understand what this means, we charge an asset-based fee which could encourage us to favor larger accounts with more assets under management, or favor clients who pay higher fees.

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*Conversation Starter ... Ask Alta: How might your conflicts of interest affect me, and how will you address them?*

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**How do your financial professionals make money?**

Our financial professionals earn a base salary, potential bonus, and potential portion of management fees received from clients gained. Factors impacting compensation include overall firm revenue, investment performance, feedback from clients, and client retention. No employee is compensated for the sale of securities. The more assets we manage for you, the greater our fee and so we have an incentive to encourage you to increase account assets. This presents a conflict because as revenues grow, our financial professionals have an opportunity to make more money. Follow this link to learn more about potential conflicts and how we address them: [www.altacapital.com/ADV2A](http://www.altacapital.com/ADV2A)

**Item 4: Disciplinary History**

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

No, we are pleased to report we have no legal or disciplinary history. You may visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research Alta and our financial professionals.

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*Conversation Starter ... Ask Alta: As a financial professional, do you have a disciplinary history? For what type of conduct?*

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**Item 5: Additional Information**

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For up-to-date information about our investment advisory services, or to request our Form ADV Part 2 or copy of this relationship summary, please call us at 801-274-6010.

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*Conversation Starter ... Ask Alta: 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?*

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