



## Form CRS Customer Relationship Summary

March 23, 2026

**I. Introduction**

Kohmann Bosshard is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ. It is important that you understand the differences. Free and simple tools are available to research firms and financial professionals at [investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about investment advisers and investing.

**II. What investment services and advice can you provide me?**

Kohmann Bosshard offers Investment Management Services to retail clients that provide for ongoing and continuous advice and services. We also offer services related to the Selection of Independent Managers, Financial Planning, and Consultation Services on a limited basis.

- **Account Monitoring:** If you open an advisory account, we will offer you advice on a regular basis. We will discuss your investment goals, design with you a strategy to achieve your investment goals, and regularly monitor your account. We will contact you (in person, by phone or e-mail) at least annually to discuss your portfolio.
- **Investment Authority:** We manage investment accounts on a discretionary or non-discretionary basis. If you sign a discretionary investment management agreement with us, you allow us to buy and sell securities in your portfolio without your prior approval. Non-discretionary arrangements require us to obtain your approval prior to executing any transactions on behalf of your account.
- **Investment Offerings:** Our advice is not limited to certain types of investments.
- **Account Minimums and Requirements:** Kohmann Bosshard typically requires a minimum investment amount of \$500,000 for Clients seeking Investment Management Services.

Detailed information regarding our services, fees and other disclosures can be found in Items 4 and 7 of our [Form ADV Part 2A](#)

*Conversation Starters. Ask your financial professional:*

- *Given my financial situation, should I choose an investment advisor 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?*

**III. What fees will I pay?**

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services

- **Asset-based fees.** For our Investment Management Services you will pay an on-going asset-based fee up to .85% at the end of each quarter or month, based on the value of the cash and investments in your advisory account(s).
- **Hourly or fixed fees.** We charge an hourly fee or fixed fee for stand-alone financial planning and consulting services. The exact fee, the work to be performed, and the billing frequency will be specifically disclosed in the Client agreement.

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.

**Description of Other Fees and Costs:** Some investments (e.g., mutual funds, variable annuities, etc.) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. You will also pay fees to a custodian that will hold your assets.

For detailed information on fees, refer to Item 5 of our [Form ADV Part 2A Brochure](#).

*Conversation Starter. Ask your financial professional:*

- *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 providing recommendations 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 recommendations and investment advice we provide you. Here is an example to help you understand what this means.*

- *We charge an asset-based fee for our investment management services. The more assets you have in the advisory account, including cash, the more you will pay us. We therefore have an incentive to increase the assets in your account in order to increase our fees.*

*Conversation Starter. Ask your financial professional:*

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

For additional information, please see our [Form ADV Part 2A brochure](#)

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

Firm employees are compensated by cash salary, which does not create a conflict of interest.

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

No. Visit [investor.gov/CRS](http://investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

*Conversation Starter. Ask your financial professional:*

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

**V. Additional Information**

- For additional information on advisory services, see our Form ADV brochure on [IAPD](#), on [investor.gov/CRS](http://investor.gov/CRS), or on [kohmannbosshard.com](http://kohmannbosshard.com) and any brochure supplement your financial professional provides.
- To request up-to-date information and request a copy of the relationship summary you can also contact us at 330-666-6886.

*Conversation Starter. Ask your financial professional:*

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