

Introduction

Doyenne Wealth Advisors LLC has filed with the U.S. Securities and Exchange Commission (SEC) as a registered investment adviser. When selecting a financial professional, it is important that you understand the differences between investment advisers and broker dealers. You can find free and simple tools provided by the SEC to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS) along with educational materials about investing.

What Investment Services and Advice Can You Provide Me?

We offer customized investment advisory and wealth counseling services that are tailored to your unique goals, objectives, and needs. Our standard service for assets under management includes monitoring your investments on an ongoing basis. We may also monitor or report on other assets under advisement on a periodic basis.

- Although we provide specific investment recommendations, you make the final decision about transactions for your portfolio; this is considered a “nondiscretionary relationship”.
- We create personalized asset allocation strategies with individualized, ongoing investment advice.
- We recommend investments that we research within our investment committee, using information from a variety of outside consultants and investment services. Investments typically include mutual funds, exchange-traded funds, separate account money managers, limited partnerships, and other pooled investments.
- We can provide a wide range of active and passive investment strategies that include equities, fixed income, hedge funds, private equity and credit, and real assets.

For additional information, please see the “Advisory Business,” “Fees and Compensation,” “Types of Clients,” and “Account Minimums” sections of our [Form ADV Part 2A](#) brochure.

Conversation Starters

Given my financial situation, should I choose an investment advisory service?

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?

What Fees Will I Pay?

We charge our clients a fixed annual fee, which is invoiced semi-annually in advance. This fee is negotiated for each client, based on assets that we supervise (assets under management or advisement) according to a fee schedule. Periodically, with your prior written approval, we may recalibrate your fee according to current asset levels or a change in scope of engagement. Therefore, we may have an incentive to increase your assets under management through growth.

- You will also pay other management fees and expenses incurred within investment vehicles such as mutual funds, exchange-traded funds, separate account money managers, limited partnerships, and other pooled investment vehicles. We do not share any part of these fees.
- You may also incur costs through other providers. Your broker-dealer may charge a transaction fee (called a “commission”) when an investment is purchased or sold. Your broker-dealer or bank that holds your assets (known as “custody”) may charge a separate fee. We do not share any part of these fees.

- You will pay fees and costs, even if you lose money on your investments. If you make money on your investments, fees and costs will reduce your gain. Be sure you understand what fees and costs you are paying.

For additional information, please see the “Fees and Compensation” section of our [Form ADV Part 2A](#) brochure.

CONVERSATION STARTERS

Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 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 acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

As your investment adviser, we take fiduciary responsibility, which means we must act in your best interest and not put our interest ahead of yours. Occasionally, the way we make money can create some conflicts with your interests and may affect the advice we provide.

- As one example: We provide financial counseling services to many professionals, some of whom are executives at investment management firms. In the course of providing specific investment recommendations to you, some of these recommendations may include investments managed by or affiliated with these executives we service. While our investments are vetted by both our Research department and many of our financial professionals that do not service such executives, these relationships may create an incentive for us to recommend their funds to you, thus creating a potential conflict of interest.

For additional information, please see the “Other Benefits or Compensation Received by the Firm or Owners” and “Brokerage Practices” sections of our [Form ADV Part 2A](#) brochure.

CONVERSATION STARTERS

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

How do your financial professionals make money?

We compensate our employees with salary and bonus, based on numerous factors such as their experience, qualifications, knowledge, skill, and the level of client service they provide.

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

No. Please visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

CONVERSATION STARTERS

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

Additional Information

For more details on our firm or the services we provide, please visit our website at www.doyenneadvisors.com or review the current version of our [Form ADV Part 2A](#) brochure. If you have additional questions or need a copy of this relationship summary, please contact us at (312) 380-0755.

CONVERSATION STARTERS

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?