**Form CRS**  
**Form ADV (Part 3) – Arrowroot Family Office, LLC - Relationship Summary**

**June 25, 2021**

**ITEM 1. INTRODUCTION**

Arrowroot Family Office, LLC is registered with the Securities and Exchange Commission as an investment adviser. Registration of an investment adviser does not imply a certain level of skill or training. Brokerage and investment advisory services and fees differ, and it is important for retail investors (“you”, “your”) to understand the difference. Free and simple tools are available to research firms and financial professionals at https://www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

**ITEM 2. RELATIONSHIPS AND SERVICES**

*What investment services and advice can you provide me?* Depending on the nature of the account and your needs, our firm may offer the following investment advisory services to you: portfolio management (we review your portfolio, investment strategy, and investments) and selection of other advisers (we select a third-party adviser for you). We do not limit the types of investments available to you, and you make the ultimate decision regarding the purchase or sale of investments. To open an account, we generally require a minimum account size of $25,000, however, this minimum may be waived in our discretion. We also offer financial planning services, asset allocation and re-balancing services, and educational seminars and speaking engagements. For additional information, please refer to our [Form ADV Part 2A](#), specifically Items 4 and 7.

As part of our advisory services, we monitor the securities held in your account(s) on an ongoing, continuous basis and communicate with you periodically through telephone, email, and in person meetings. This review is done to monitor your portfolio for compliance with your investment objectives and risk tolerance. This review is a standard part of our advisory services. You are responsible to inform us of any changes in your investment objectives and/or financial situation.

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<thead>
<tr>
<th>Additional Questions to Ask Your Financial Professional</th>
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<tr>
<td>1. Given my financial situation, should I choose an investment advisory service? Why or why not?</td>
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<td>2. How will you choose investments to recommend to me?</td>
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<td>3. What is your relevant experience, including your licenses, education and other qualifications?</td>
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<td>4. What do these qualifications mean?</td>
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**ITEM 3. FEES, COSTS, CONFLICTS, AND STANDARD OF CONDUCT**

*What fees will I pay?* If you open an investment advisory account with us, you will be charged an ongoing asset-based fee on the value of cash and investments in the advisory account. The fees are charged to you either quarterly in arrears or monthly in advance. Fees for financial planning services are negotiable and are based on the scope of the engagement and level of complexity.

Some investments (e.g., mutual funds, variable annuities) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. The same goes for any additional fees you pay to a custodian. Also, you will pay transaction fees, if applicable, when we buy or sell an investment for 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. Please also see our [Form ADV Part 2A](#), specifically Item 5.
Additional Questions to Ask Your Financial Professional

1. Help me understand how these fees and costs might affect my investments.
2. 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 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. 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. Here are some examples to help you understand what that means.

- We may recommend you investments in certain private funds that are managed by us or our affiliates. Therefore, a potential conflict may exist in that we or our affiliates may receive certain economic benefit from investments made in such funds.
- We may refer you to an affiliate for other services such as assistance with a loan or with tax filings, which may have shared ownership with the owners of Arrowroot Family Office, LLC. Therefore, a potential conflict may exist in that we or our affiliates may receive certain economic benefit from services they provide you.

For additional information, please refer to our Form ADV Part 2A.

Additional Questions to Ask Your Financial Professional

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

How do our financial professionals make money? Our financial professionals are compensated in the following ways: Cash compensation in the form of an annual salary and bonuses or commissions related to (1) the amount of client assets, (2) product sales, and / or (3) revenue we earn from the financial professional’s advisory services or recommendations. Therefore, a potential conflict may exist due to these compensation arrangements.

ITEM 4. DISCIPLINARY HISTORY

Do we or our financial professionals have legal or disciplinary history? Yes. Please visit https://www.investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Additional Questions to Ask Your Financial Professional

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

ITEM 5. ADDITIONAL INFORMATION

We encourage you to seek out additional information about our investment advisory services and to request a copy of this relationship summary by contacting Rob Santos, Managing Director and Chief Compliance Officer at (310) 341-4774 or rob@arrowrootfamilyoffice.com. Please see our Form ADV (Part 1A) and Form ADV (Part 2A & 2B – Brochure and Brochure Supplement) on arrowrootfamilyoffice.com, adviserinfo.sec.gov or Investor.gov.

Additional Questions to Ask Your Financial Professional

1. Who is my primary contact person?
2. Is he or she a representative of an investment adviser or broker-dealer?
3. Who can I talk to if I have concerns about how this person is treating me?