GreenPort Capital Advisors, LLC

SEC-Registered Investment Adviser | Form CRS Relationship Summary | June 8, 2026

Introduction

GreenPort Capital Advisors, LLC ("GreenPort Capital Advisors" or "GPCA" or "we") is registered with the Securities and Exchange Commission as an **investment adviser**. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about investment advisers, broker-dealers, and investing.

What Investment Services and Advice Can You Provide Me?

We offer **investment advisory services** to retail investors. Our principal services include discretionary portfolio management, comprehensive financial planning, retirement income planning, and estate planning coordination. We do not offer brokerage services or hold customer funds or securities.

Monitoring: We monitor your investments on an ongoing basis as part of our standard services. Portfolio reviews occur at least quarterly, with more frequent reviews during significant market events or life changes. This monitoring is included in our advisory fee.

Investment Authority: We accept **discretionary authority** to purchase and sell investments in your account without obtaining your prior approval for each transaction. This authority is granted through our investment advisory agreement and remains in effect until you or we terminate the relationship. We have no fixed time limit on this authority.

Limited Investment Offerings: We do not limit our recommendations to proprietary products or a narrow menu of investments. We provide advice across a broad range of securities, including individual stocks and bonds, mutual funds, exchange-traded funds (ETFs), options, and certain alternative investments, subject to our due diligence and suitability standards.

Account Minimums and Other Requirements: We generally require a minimum of $1,000,000 in investable assets to establish an advisory relationship. We may waive or reduce this minimum for certain clients, such as family members of existing clients or in other circumstances at our discretion.

Additional Information: For more detailed information about our services, including the types of investments we recommend and our investment process, please refer to **Items 4 and 7 of our Form ADV Part 2A brochure**, available on our website or upon request.

Conversation Starters

- *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 are the risks of your recommended investments?*
- *What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?*

What Fees Will I Pay?

Description of Principal Fees and Costs: We charge an ongoing **asset-based advisory fee**. Our standard fee schedule is 0.50%-1.00% annually, depending on the asset level. Fees are calculated quarterly in advance based on the account's market value at the end of the prior quarter and are deducted directly from your account. **The more assets there are in your advisory account, the more you will pay in fees, and we therefore have an incentive to encourage you to increase the assets in your account.**

Description of Other Fees and Costs: In addition to our advisory fee, you may incur other costs, including: mutual fund and ETF expense ratios (typically 0.03%–0.80% annually), custodian fees, transaction costs for certain securities, and fees associated with alternative investments or margin. These fees are paid directly or indirectly by you and are separate from our advisory fee.

Additional Information: 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 detailed information about our fees, please see **Item 5 of our Form ADV Part 2A brochure**

Conversation Starter

- *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 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 this means.

We charge fees based on the value of assets we manage for you. Because of this, we have an incentive to encourage you to increase the assets in your account or keep assets under our management rather than moving them elsewhere. For example, we may have a financial incentive to recommend that you invest additional funds with us instead of using those funds for other purposes, such as paying down debt.

Additional Information: For more information about our conflicts of interests and the ways we are compensated, please see **Item 5, Item 10, Item 12 and Item 15** of **our Form ADV Part 2A**

Conversation Starter

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

How do your financial professionals make money?

Our financial professionals are compensated primarily through a share of the advisory fees we collect from the clients they serve. Compensation is based on the amount of client assets they manage, the time and complexity involved in servicing the client relationship. This compensation structure creates a conflict of interest because our professionals have an incentive to: (1) recommend that you add more assets to accounts we manage, and (2) retain your assets under our management.

Do You or Your Financial Professionals Have Legal or Disciplinary History?

No. Neither us, nor our investment adviser representatives have a legal or disciplinary history to report. You can look up more information about us and our investment adviser representatives at https://www.investor.gov/CRS.

Conversation Starter

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

Additional Information About GreenPort Capital Advisors

Additional information about us and a copy of this relationship summary are available on the Internet at http://www.greenportcapitaladvisors.com. You can also find our disclosure brochures and other information about us at https://adviserinfo.sec.gov/firm/summary/205511. If you have any questions or want an up-to-date copy of this relationship summary, we can be reached by phone at 978-393-3090.

Conversation Starter

- *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?*