

Client Relationship Summary (Form CRS, Form ADV Part 3)

Item 1 – Introduction

Snyder Asset Management, LLC (the "Firm") is a registered investment adviser registered with the State of Maryland. Snyder has filed an application to register with the United States Securities and Exchange Commission. Until such registration becomes effective, the firm remains registered with the State of Maryland. 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 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?

Description of Services. The Firm provides investment advisory services to retail investors. Our wealth management services generally include ongoing portfolio management, financial planning, retirement planning, cash flow analysis, tax-efficient planning strategies, investment consulting, asset allocation, and investment monitoring.

We tailor our recommendations and investment strategies to each client's financial situation, investment objectives, time horizon, and risk tolerance. We primarily invest client assets in diversified mutual funds, exchange-traded funds ("ETFs"), individual stocks, bonds, and, when appropriate, alternative investments.

We may engage an independent third-party financial consultants, including other registered investment advisers, to assist with financial planning services. You will not pay an additional fee for these services.

Monitoring. As part of our standard wealth management services, we continuously monitor client accounts and generally conduct formal reviews at least annually. Additional reviews may occur when there are significant changes in a client's financial circumstances, market conditions, or investment objectives.

Investment Authority. We generally manage client investment accounts on a discretionary basis. This means we are authorized to buy and sell investments in your account without obtaining your prior approval for each transaction, subject to any investment guidelines or restrictions you establish.

Financial planning recommendations are provided on a non-discretionary basis, meaning you make the final decision regarding whether to implement our recommendations.

Limited Investment Offerings. We do not limit our advice to proprietary products or a limited menu of investments. We generally recommend diversified portfolios consisting primarily of mutual funds, exchange-traded funds, individual stocks, bonds, and other investments that we believe are appropriate based on your individual circumstances.

Account Minimums and Other Requirements. We generally require a minimum of \$1,000,000 in investable assets to establish an advisory relationship. However, we may waive this minimum at our discretion.

Additional Information. This is a brief summary of our services. Additional information is available in Item 4 of our Form ADV Part 2A ("Disclosure Brochure"). See [Item 5 - Additional Information](#) below for instructions on how to obtain a copy of our Disclosure Brochure.

Ask Your Investment Adviser

- 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?

Item 3 – Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Principal Fees and Costs. We charge an ongoing asset-based advisory fee that is calculated as a percentage of the assets we manage on your behalf. Fees are billed quarterly in advance and generally range from 1.20% to

1.50% annually, depending on the complexity of your financial situation, and will not exceed 2.00% annually.

Wrap Fee Programs. We do not offer a wrap fee program.

Other Fees and Costs. In addition to our advisory fees, you may incur other fees and costs, such as custodian fees, account maintenance fees, fees related to mutual funds, or other administrative fees. Please refer to Item 5 of our Disclosure Brochure for details on additional fees.

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. Additional information about our fees is available in Item 5 of our Disclosure Brochure. See [Item 5 - Additional Information](#) below for instructions on how to obtain a copy of our Disclosure Brochure.

Ask Your Investment Adviser

- 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.

Conflicts of Interest. An asset-based fee presents a conflict of interest because the more assets you have in your advisory account, the more you will pay in fees; therefore, we may have an incentive to encourage you to increase the assets in your account.

We do not offer any proprietary products, receive any compensation for client referrals or revenue sharing, or have any other sources of revenue.

Ask Your Investment Adviser

- 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 from the advisory fees clients pay to the Firm. As owner of the Firm, Philip Snyder benefits from the overall profitability of Snyder Asset Management. Compensation increases as advisory assets under management increase, creating an incentive to grow client assets under management.

Item 4 – Disciplinary History

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

No. Visit www.investor.gov/crs for a free and simple search tool to research our firm and our financial professionals.

Ask Your Investment Adviser

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

Item 5 – Additional Information

Additional information is available in our Disclosure Brochure. An up-to-date copy of this document, as well as our current Form CRS is available on our website at www.snyderassetmgmt.com. You may also call us at (410) 216-1249 or send an email to philip.snyder@snyderassetmgmt.com to obtain copies of these documents at any time.

Ask Your Investment Adviser

- 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?

Exhibit A – Summary of Material Changes

As this is our initial Form CRS, we do not have any material changes to report.