Client Relationship Summary
(Form CRS)

MontVue Capital Management, Inc ("MontVue") is registered with the Securities and Exchange Commission as an investment adviser, and as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ, and it is important for you, our client, to understand the differences. Additionally, free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

What investment services and advice can you provide?

We offer **Financial Planning Services and Portfolio Management Services** to retail investors**.**

- **Account Monitoring:** If you open an investment account with our firm, as part of our standard service we will monitor your investments on an annual basis.
- **Investment Authority:** We manage investment accounts on a discretionary basis whereby we will decide which investments to buy or sell for your account. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased or sold for your account) by providing our firm with your restrictions and guidelines in writing.
- **Investment Offerings:** We provide advice on various types of investments. Our services are not limited to a specific type of investment or product.
- **Account Minimums and Requirements:** In general, we require a minimum account size to open and maintain an advisory account, which may be waived in our discretion.

Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A, Items 4, 7, and 8 by clicking this link https://adviserinfo.sec.gov/firm/brochure/116807

Ask Your Financial Professional

- 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?

What fees will I pay?

The following summarizes the principal fees and costs associated with engaging our firm.

- **Portfolio Management Services:**
  Asset Based Fees - Payable quarterly in arrears.
- **Financial Planning Services:**
  Annual Fee - Payable in arrears.

In addition to our principal fees and costs, there are other common fees and costs that may be applicable to our clients that include:

- Custodian fees;
- Account maintenance fees;
- Fees related to mutual funds and exchange-traded funds;
- Transaction charges when purchasing or selling securities;
- 3rd party or subadvisor fees; and
- Other product-level fees associated with your investments.

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 detailed information, refer to our Form ADV Part 2A, Items 5 and 6 by clicking this link - https://adviserinfo.sec.gov/firm/brochure/116807.

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 acting as my investment adviser? What conflicts of interest do you have?

When we act as your investment adviser, we must 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. For an example to help you understand what this means:

- Because our revenue is derived from asset-based fees, we have an incentive to grow your account as much as possible. This could cause us to take overly aggressive positions in conflict with your interests to grow your account or could incentivize us to inflate the valuations of illiquid investments held in your account.

Refer to our Form ADV Part 2A by clicking this link - https://adviserinfo.sec.gov/firm/brochure/116807 to help you understand what conflicts exist.

Ask Your Financial Professional

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

How do your financial professionals make money?

MontVue and the financial professionals servicing your account(s) are compensated in the form of salary and bonus based on professional development.

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

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. Visit Investor.gov/CRS for a free and simple research tool.

Ask Your Financial Professional

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at 434-455-2795 or click the link provided https://adviserinfo.sec.gov/firm/brochure/116807.

Ask Your Financial Professional

- 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?