

**Ivesta Corp.**  
**Form CRS Customer Relationship Summary**  
**September 2025**

**Introduction**

Ivesta Corp. (“Ivesta”) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. We provide investment advisory services primarily to ultra-high net worth individuals and families. We do not offer brokerage services. 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](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

**What investment services and advice can you provide me?**

We offer non-discretionary investment advisory services. Often, these clients utilize the services of other investment advisers to manage their portfolios. Ivesta offers those clients services which include due diligence on those third-party advisers and a review of the portfolio to determine if it meets the needs of the client. The Firm, in accordance with the portfolio calibration necessary and other factors, will source investment solutions across all appropriate asset classes, including both traditional and non-institutional distribution channels. Then the Firm will conduct due diligence on these potential investments and determine suitability of those investments for the client. Such due diligence analysis will include prior performance and costs associated with those investments. Once suitability has been established, the Firm will recommend the investments. These services are offered as part of our standard services. We also offer concierge services that aims to help clients manage their family affairs with the same level of expertise used to manage their financial assets, for an additional fee.

We generally require a minimum account size of \$20 million. This minimum may be waived.

The actual investment strategies and processes employed by the Firm, as well as associated risks are discussed in detail in Item 8 of Form ADV 2A.

*Our brochure will be available on the SEC Website at <https://adviserinfo.sec.gov/firm/brochure/316791>. Please refer specifically to Item 4 for a complete description of the services we provide and Item 7 for description of the types of clients we serve.*

**Conversation Starters – Ask your Financial Advisor**

**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 licenses, education and other qualifications?**

**What do these qualifications mean?**

**What Fees Will I Pay?**

Our fees for providing investment advisory services are generally based on a percentage of assets under management. Ivesta’s fee will range between .50% and 1% depending on the size of the account at the commencement of the engagement. For more detailed information about your fees and costs, please refer to our Form ADV, Part 2A brochure, items 5 and 6.

We may receive certain performance-based fees from clients. We also may receive an additional fee for concierge services provided.

Fees are negotiable, at our discretion, on a case-by-case basis.

In addition to the fees paid to Ivesta, clients may also incur certain charges imposed by other third parties, such as broker-dealers, custodians, trust companies, banks, and other financial institutions (collectively “Financial Institutions”)

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.

**Conversation Starters – Ask your Financial Advisor**

**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 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. Here are some examples to help you understand what that means:*

The Firm's affiliate, Ivesta Family Office, has a clientele similar to that of the Firm. Accordingly, such limited investment opportunities could be suitable for clients of the affiliate as well. Key employees of the Firm are also employees of the affiliate.

For more detailed information on conflicts of interest, please refer to our Form ADV2 A brochure, item 10.

**Conversation Starters – Ask your Financial Advisors**

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

**How do your financial professionals make money?**

Our principals are compensated via salary and share of profits. Other investment professionals are compensated by salary and discretionary annual bonus. There is no compensation for our employees based on the time and complexity required to meet a client's needs, the amount of client assets they service, the products sold, or product sales commission. There is no non-cash compensation.

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

Yes. You can visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research our financial professionals.

**Conversation Starters – Ask your Financial Advisors**

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

**Additional Information**

*Additional information about our advisory services is available at the following:*

- Our company website: <https://ivesta-fo.com/>
- The SEC website: <https://adviserinfo.sec.gov/firm/summary/>
- If you would like to request a copy of this relationship summary, contact us by phone at 917-864-0407

**Conversation Starters - Ask your Financial Advisor:**

**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?**