



## Form CRS March 28, 2024

Jackson Square Partners, LLC (“Jackson Square” or the “Firm”) is registered with the U.S Securities and Exchange Commission (“SEC”) as an investment adviser. We provide investment advisory services and not brokerage services. Investment advisory services and brokerage services and fees differ, and it is important that you 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?

Jackson Square offers investment advisory services to clients, including retail investors, and specializes in long-term capital growth. Jackson Square constructs and maintains model portfolios for each investment strategy. Client accounts, including retail investors, are invested in the same securities and at approximately the same weights as the applicable strategy-specific model portfolio, unless client-imposed guidelines or contract considerations prohibit or restrict an investment.

- **Monitoring:** our personnel work together to review all client accounts on a regular basis. Additional account reviews are conducted periodically to ensure adherence with client guidelines and restrictions.
- **Investment Authority:** we typically receive discretionary authority from our clients at the commencement of an advisory relationship to select and identify the amount of securities to be bought or sold.
- **Limited Investment Offerings:** we manage portfolios of concentrated equity positions based on the specific equity strategy selected by the client. We do not manage other asset classes, nor do we offer financial planning and analysis.
- **Account Minimums and Other Requirements:** Except for certain legacy client relationships, the minimum separate account size for any client is \$50 million.

Please refer to our Form ADV Part 2A Brochure (Items 4 and 7) (available at [https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd\\_iapd\\_Brochure.aspx?BRCHR\\_VRSN\\_ID=836179](https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=836179)) for more detailed information on our services.

#### *Ask your financial professional:*

1. *Given my financial situation, should I choose an investment advisory service? Why or why not?*
2. *How will you choose investments to recommend to me?*
3. *What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?*

### What fees will I pay?

We charge investment advisory fees calculated as a percentage of assets under management and, in limited instances, performance fees. Since we charge an asset-based fee, a conflict of interest exists in that the more assets there are in your account, the more you will pay us in fees. This means we have an incentive to encourage you to increase the assets in your account. Fees are typically assessed quarterly in arrears.

In addition to the advisory fee you pay us, you may incur additional fees and costs related to the investments in your account, such as: custodian fees, account maintenance fees, transaction costs/brokerage commissions, wire transfer and electronic fund fees, fees related to mutual funds, such as management fees, and administration expenses. These fees are separate and distinct from our fees.

**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 refer to Item 5 of our Form ADV Part 2A Brochure for more detailed information about our fees.**

***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? 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 interests 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:

- As described in Item 6 of our Form ADV Part 2A Brochure, our portfolio managers make investment decisions for multiple strategies and, therefore, management of multiple portfolios creates conflicts of interest. This includes conflicts in the allocation of investment opportunities and differences in fees among the strategies and types of accounts.
- A conflict of interest also arises where we have an incentive to favor accounts and/or investment strategies in which our portfolio managers or employees have a substantial interest.

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

**You should carefully review our Form ADV Part 2A Brochure for more detailed information about our conflicts of interest.**

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

Our portfolio managers receive a base salary and an annual discretionary bonus based on both the performance of the Firm and the individual performance contribution of each portfolio manager. In addition, our portfolio managers have equity ownership in our Firm and receive partnership distributions based on our Firm's revenues. Likewise, because portfolio managers invest in some of the funds that we manage and because we receive performance-based fees from certain accounts we manage, portfolio managers may have an incentive to favor those accounts over other accounts in which they do not have such financial interests.

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

No. Please visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research our firm and your financial professional.

***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 our advisory services in our Form ADV Part 2A Brochure and may request up-to-date information and a copy of our Relationship Summary by contacting our Chief Compliance Officer at (415) 635-0213.**

***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?***