

EDMP, Inc. Form CRS

Item 1 Introduction

6/18/2020

EDMP, Inc. 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. The SEC offers free and simple tools to research firms and financial professionals at Investor.gov/CRS which also provides information tailored to educate retail investors about financial professionals.

Item 2 Relationships and Services

What investment services and advice can you provide me?

We are a registered investment adviser that offers investment advisory services primarily to retail clients. The principal service we offer is investment management services (Portfolio Management) where, after meeting with you either in office or via a WebEx and reviewing our investment strategies, we invest your assets in accordance with your investment objectives.

If you utilize our investment management services, you will typically give us discretionary authority to trade the assets in your account through a limited power of attorney contained in your client agreement with us. We will monitor the holdings and performance of the investments we make for you on an ongoing basis and will provide you with reports about the performance and holdings of your account. We generally require new clients to have an account minimum of \$500,000, but reserve the right to waive account minimums under appropriate circumstances.

For additional information including minimum investment amounts, please see www.edmpinc.org for our Form ADV, 2A brochure (Items 4 and 7 of Part 2A or Items 4.A. and 5 of Part 2A Appendix 1).

Conversation starters. 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?*

Item 3 Fees, Costs, Conflicts and Standard of Conflict

What fees will I pay?

For our investment management services, we charge a percentage of assets fee. Our fees can be assessed quarterly in advance, or in some circumstances in arrears, and are disclosed in our Form ADV Part 1A, Item 5.E. and more fully described in our Form ADV Part 2A, Items 5.A., B., C., and D. Some fees create a conflict of interest described below and in more detail in our Firm's Part 2A.

The only compensation we receive is from our clients; we work for you. However, in addition to our fees, you will be responsible for other fees and expenses associate with the investment of your assets. Such other fees and expenses may include brokerage commission and other transaction costs, fees charged by your custodian, exchanges, and taxes.

There are other fees and costs that may be related to our investment advisory services if you use a third-party intermediary in addition to the principal fees and costs listed above that you will pay directly or indirectly. Examples of the most common fees and costs are wrap program fees and third-party advisory 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. Since you pay a percentage of assets, we are directly compensated according to how well your portfolio performs.

For more detailed information about our fees and costs please review our Form ADV, Part 2A brochure (specifically Items 5.A., B., C., and D.) which can be found at www.edmpinc.org.

Conversation starters. 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 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 examples to help you understand what this means.

- EDMP does have a "soft dollar" arrangement with Charles Schwab under which we recommend as custodian to some of our clients, and which we execute securities transactions through, and, in exchange, they provide us with research products or services.

Conversation starters. *Ask your financial professional:*

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

Additional information:

For more detailed information about our fees and costs please review our Form ADV, Part 2A brochure (specifically Items 5.A., B., C., and D.) which can be found at www.edmpinc.org.

How do your financial professionals make money?

- Employees are compensated through salary and bonus.

Item 4 Disciplinary History

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

Our firm has no disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Conversation Starters. *Ask your financial professional:*

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

Item 5 Additional Information

You can find additional information about our services and request a copy of the relationship summary by visiting www.edmpinc.org; emailing at juliec@edmpinc.com or calling us at 813-960-9600.

Conversation starters. *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?*