

# Campbell Capital Management

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## Customer Relationship Summary-

This Summary relates to you, our customer and your relationship with our firm, Campbell Capital Management, Inc. (“CCM”), a registered investment advisor with the SEC. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at [www.Investor.gov/CRS](http://www.Investor.gov/CRS), which also provides educational materials about broker dealers, investment advisors, and investing.

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

CCM provides the following services to retail investors: investment advice, and asset allocation using discretionary management. Given we only manage discretionary accounts our authority is limited to buying and selling securities for your account in correlation with your investment strategy. You must meet certain investment minimums to open an advisory account.

**For additional information**, please request a copy of our Form ADV Part 2A from [info@camcap.com](mailto:info@camcap.com).

**Conversation Starters:** *“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 annual fee for investment services is usually assessed as a percentage of assets under management (“AUM”). The fee is usually 1.5% charged quarterly in arrears. Other costs incurred by retail investors may include custodian fees, account maintenance fees, fees related to mutual funds and ticket charges from broker dealers. Fees and costs will be deducted from your account regardless of performance. 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.

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**Conversation Starters:** *“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 advisor? How else does your firm make money and what conflicts of interest do you have?**

We must act in your best interest and not put our interest ahead of yours. We only derive revenue from our management fee (discussed above).

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**Do you or your financial professional have legal or disciplinary history?** No employees of CCM have any legal or disciplinary history.

Visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

**Conversation Starters:** *“As a financial professional, do you have any disciplinary history? For what type of conduct?”*

**For additional information** about CCM’s services, or if you wish to discuss investing with CCM further, please contact us at 305-670-3140, review our website at [www.CamCap.com](http://www.CamCap.com), or email us at [info@camcap.com](mailto:info@camcap.com).

**Conversation Starters:** *“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?”*