Item 1 – Introduction

Aristotle Capital Management, LLC ("Aristotle Capital") is registered with the SEC as an investment adviser that provides advisory 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, which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2 – Relationships and Services

What investment services and advice can you provide me?

We offer discretionary investment advisory services to retail investors primarily in equity, fixed income and balanced portfolios. Aristotle Capital's investment offerings are available as a separately managed account under direct agreement and in wrap and model delivery programs. The following is part of our standard offering:

Monitoring	As part of our standard offering, Aristotle Capital monitors discretionary investments it manages on behalf of retail clients on an as-needed-basis, but no less than quarterly.
Investment Authority	As part of our standard offering, we are retained on a discretionary basis by retail clients in our investment advisory agreement ("IMA") to manage separate accounts. This grants us authority to place transactions on your behalf, including determining the security, amount, and broker used. Clients may specify restrictions to limit this authority in the IMA or an accepted written letter of instruction. We assume discretion over the account after the IMA is executed and the custodian confirms the account is ready to trade.
Investment Offerings	We do not limit our advice to proprietary products, or a limited menu of products or types of investments.
Requirements	The retail separate account minimum is $1,000,000, but we reserve the right to waive the minimum. Minimum account requirements may vary by wrap and model delivery program.

For additional information about Aristotle Capital's offerings, see Items 4, 7, 8, 13 and 16 of the Form ADV Part 2A Brochure available on our website footer at https://www.aristotlecap.com/affiliates/aristotle-capital-management/ or on the SEC's website at https://adviserinfo.sec.gov/firm/summary/109876.

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 Conduct

What fees will I pay?

Our annual separate account management fee for retail clients ranges from 0.30% – 1.00% on assets under management and is billed in advance and payable upon receipt, unless stated otherwise in our IMA. Separate account clients may be invested in mutual funds and mutual funds charge their own management fee as outlined in the fund prospectus. Clients invested in an Aristotle mutual fund in their managed account are not billed on that investment. Generally, the fee collected by the program manager for wrap and model accounts ranges from 1% - 3% per annum of assets under management. From the fee paid to the wrap or model delivery program manager, we receive between 0.25% - 0.50% per annum on assets allocated to Aristotle Capital depending on the platform and strategy involved. Generally, the fees associated with wrap and model programs include brokerage commissions and trading costs.

Our fees are asset based. Thus, our fees increase if the assets in your advisory account increase. This may create an incentive to encourage you to increase the assets in your account by adding funds or accepting greater investment risk. Our advisory fee is exclusive of any brokerage commissions, transaction fees, and other related costs/expenses incurred by the client. Clients may incur certain charges imposed by custodians, brokers and other third parties, including but not limited to fees charged by investment consultants/financial advisors, custodial fees, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. Also, mutual funds and ETFs charge fund operating expenses, which

are disclosed in a fund's prospectus and/or financial filings. In a wrap fee arrangement, clients pay a single fee for advisory, brokerage, and custodial services.

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 additional information, see our ADV Part 2A Brochure, Item 5 available in the above Brochure link. If you are considering a program through which Aristotle Capital provides investment advice, you should review the sponsor's disclosure materials to understand the fees they will charge you.

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 some examples to help you understand what this means. Differing fee arrangements increase the risk that higher fee paying accounts may receive priority over other accounts during allocation. We mitigate these risks by implementing a trade rotation process, blocking trades, maintaining proper written records with respect to allocations, and allocating at average price. Some investment adviser representatives of Aristotle Capital are registered with Foreside Financial Services, LLC, to market mutual funds including those in the Aristotle family of mutual funds, which are mutual funds managed by Aristotle Capital and its affiliates. This creates conflict because they have an incentive to offer an Aristotle mutual fund over other mutual funds. To mitigate this conflict, we disclose this to clients. For additional information about our conflicts, please see Item 5 of the Form ADV Part 2A Brochure available in the above Brochure link.

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

How do your financial professionals make money?

Our financial professionals are compensated with base salary, benefits and annual discretionary bonus, which is based on objective and subjective criteria such as the individual's contribution to overall firm goals and teamwork. The bonus allocation set aside by management annually is determined by firm profitability. Personnel who are equity owners may also be compensated based on their equity ownership. In addition to registered representatives receiving commission or remuneration for the sale of mutual funds, certain employees of Aristotle Capital may be compensated for obtaining new clients for the firm or its affiliates. If an employee of the firm obtains a new client for the firm or its affiliates, Aristotle Capital or its affiliate may pay the employee a percentage of the management fee charged to the client. This receipt of payment creates a conflict of interest and an incentive to encourage you to increase assets in your account as the employee's compensation may increase as assets in your account increase.

Item 4 – Disciplinary History

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

No for our firm. Yes for our financial professionals. A free and simple search tool to research us and our financial professionals is available at Investor.gov/CRS.

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

Item 5 – Additional Information

Additional information about our investment advisory services and an up-to-date copy of the relationship summary is available by contacting us at *(310) 478-4005.*

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?

Material Changes

The following material updates have been made to this Form CRS since our last filing on March 19, 2026.

1. Item 4 updated.