**FORM CRS – CLIENT RELATIONSHIP SUMMARY**
**Hudson Edge Investment Partners, Inc.**
**MARCH 31, 2026**

Hudson Edge Investment Partners, Inc. is an investment adviser registered with the Securities and Exchange Commission. Services and fees of investment advisers and broker-dealers differ, and it is important to understand those differences. Simple tools for researching firms and financial professionals are freely available at www.Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

## Relationship and Services

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

Hudson Edge Investment Partners provides investment advisory services, including financial planning and portfolio management, to retail investors, including individuals, family foundations and trusts. Hudson Edge Investment Partners also serves as the sub-adviser to several wrap fee programs by providing portfolio management services to institutions. The program sponsor pays us a portion of the advisory fee. While Hudson Edge Investment Partners' advice is holistic, broadly covering each client's financial situation, our investment recommendations most often involve stocks, bonds, mutual funds, and exchange traded funds. Hudson Edge Investment Partners' standard services include monitoring and advising on clients' investment portfolios on a continuous basis.

Our clients typically grant us ongoing discretionary authority to manage their accounts, which means that we can buy and sell investments on behalf of our clients without seeking client permission on a trade by trade basis.

Hudson Edge generally requires a minimum account size of $50,000, although we may waive this requirement at our discretion. Assets of family members may be aggregated for purposes of meeting this minimum.

**More detailed information about Hudson Edge's services is available on Part 2 of our Form ADV, which is available Here.**

*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 me?*
- *What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?*

## Fees, Costs, Conflicts, and Standard of Conduct

*What fees will I pay?*

Hudson Edge Investment Partners charges clients an investment management fee that is based on the value of each client's assets under management. Fees are negotiable and range between 0.30% to 0.90% annually, depending on the size and complexity of each client's accounts. Fees are charged quarterly in arrears, based on account values at the end of each quarter. Hudson Edge's fees generally increase as client accounts grow, so we have an incentive to encourage our clients to increase the amount of assets in the accounts that are under our management. Additional information about Hudson Edge's fees is included in Item 5 of Part 2 of Form ADV, available **Here.**

In addition to Hudson Edge Investment Partners' investment management fee, clients bear transaction fees when Hudson Edge buys or sells investments. Clients also pay fees to the broker-dealer or bank that maintains each account (called "custody" fees). Hudson Edge may select purchases of mutual funds and exchange traded funds for a portion of clients' portfolios. Such investment vehicles pay their own management, transaction, and administrative fees and expenses, and those fees and expenses are indirectly borne by the investors in those vehicles, including Hudson Edge's clients.

**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.**

*Ask your financial professional: Help me understand how these fees and costs might affect my investments.*

*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:

- We manage accounts for multiple clients, and we allocate our time based on each client's needs. Hudson Edge earns more as we expand our client base and grow our assets under management, and we seek to balance our staffing with the individualized needs of each client.

We receive research from broker-dealers when we place trades. This creates a conflict because it gives us an incentive to trade with those firms.

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

*How do your financial professionals make money?*

Hudson Edge Investment Partners' financial professionals receive a salary and may receive a discretionary bonus. Compensation is set with the intention of attracting and retaining highly qualified professionals. Compensation is based on a variety of factors, including the number, value and complexity of accounts under management, the performance of those accounts, and client satisfaction and retention.

**Disciplinary History**

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

No. Neither Hudson Edge Investment Partners, nor its financial professionals, has legal or disciplinary events to disclose. You can research Hudson Edge and our financial professionals using the free and simple search tool available at www.Investor.gov/CRS.

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

**Additional Information**

Updated copies of this form, and additional information about Hudson Edge, can be found at www.HudsonEdgeIP.com. You can also request an up-to-date version of this Relationship Summary, or the more detailed Part 2 of Form ADV, by calling 201-659-3700.

*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?*

*Hudson Edge strongly encourages clients and prospective clients to review this Form CRS in its entirety and to call us at 201-659-3700 with any questions you may have. More detailed information about Hudson Edge's services, fees, and conflicts of interest, is available on Part 2 of our Form ADV, which is available **Here**.*