



Item 2 – Material Changes

This Brochure dated 3/14/2025 replaces our last amendment dated 3/14/2024. We will provide you with an updated Brochure, as needed, based on changes or new information, at any time, without charge. Currently, this Brochure may be requested by contacting us at info@granitepartners-llc.com or 310-933-4292 or is available at www.granitepartners-llc.com.

The material updates since our last annual amendment, dated 03/14/2024, are as follows:

Item 4.A: Updated to include Douglas Morse and Erik Rolle as principal owners of the firm, and updated Types of Advisory Services to include pension and profit-sharing plans.

Item 4.B: Revised language surrounding sub-advising mutual funds in “Types of Advisory Services” offered.

Item 4.C: Revised language surrounding Mutual Funds in “Client Objectives/Restrictions.”

Item 5.A: Revised language for “Standard Fees for Mutual Funds.”

Item 4.E: Updated amount of Regulatory Assets Under Management.

Item 7: Updated “Types of Clients” to include pension and profit-sharing plans, and updated Mutual Funds language.

Item 8: Added language about use and risks of artificial intelligence (“AI”) as a method of analysis.

Item 13.B: Added tax loss harvesting as a “Factor that May Trigger an Account Review Outside of Regular Review.”

Item 17.A: Revised language for Voting Policies & Procedures.

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