



Form ADV Part 3 – Client Relationship Summary

Date: 3/27/2023

Item 1: Introduction

The Stanley-Laman Group, Ltd. (“SLG”) is an investment adviser registered with the Securities and Exchange Commission. SLG offers portfolio management and financial planning services. This document gives you a summary of the types of services we offer and the fees that we charge. You may also visit Investor.gov/CRS for free and simple tools that are available to research firms and financial professionals, which also provides educational materials about broker-dealers, investment advisers, and investing. Please feel free to ask us for more information if you need it.

Item 2: Relationships and Services

What investment services and advice can you provide me? Our firm’s primary services include portfolio management and financial planning. Portfolios managed by SLG are generally designed to either: meet an investment objective such as Growth, Income, etc., or access a particular market sector, industry, or geographic region, in which investments are made. Financial advisory services include: individual investment analysis and recommendations, estate planning, business planning, insurance analysis and review. The financial advisory services may result in recommendations to invest in one of several SLG-managed portfolios. SLG offers “discretionary accounts” without any material limitations. Payment to SLG for investment in an SLG-managed account is an asset-based fee calculated at the beginning of each quarter based on the total portfolio value in your advisory account. We will offer you advice on a regular basis and monitor client accounts daily. In some cases a client may desire to place certain restrictions or stipulations on the investment of an account or accounts and SLG may agree to these stipulations (a “non-discretionary account”). Please also see Items 4 and 7 in our Form ADV Part 2A (“Brochure”).

Key questions to ask. Ask our financial professionals these key questions about investment services and accounts.

1. Given my financial situation, why should I choose an advisory account?
2. How will you choose investments to recommend to me?
3. 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? Fee arrangements are established in published uniform schedules. In certain cases SLG may agree to alter the published fee schedule. Under the normal published fee schedule, fees will be imposed as a percentage of assets under management; the more assets you have in your SLG advisory accounts, the billing rate may be reduced. Clients are billed in advance each calendar quarter, authorizing SLG to debit fees from their accounts. SLG may in its discretion agree to fee payments in a method other than direct account debiting. Accounts

initiated during a calendar quarter will be charged a prorated fee. There are no fees charged by SLG to terminate an account.

There are no custody, account maintenance or transaction fees for buying or selling equity securities at SLG's primary custodian (Charles Schwab). You will pay a transaction fee when buying or selling fixed income securities, transaction-fee funds and other instruments. Some investments (such as mutual funds or exchange-traded funds) impose additional fees that will reduce the value of your investment over time.

The more assets you have in the advisory account the more you will pay us. We, therefore, have an incentive to increase the assets in your account in order to increase our fees. 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.

Key questions to ask. Ask our financial professionals these key questions about fees.

1. 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?

Item 4: Disciplinary History

Do you or your financial professionals have legal or disciplinary history? We have no legal or disciplinary events. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Key questions to ask. Ask our financial professionals these key questions about their disciplinary history.

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

Item 5: Additional Information

For additional information on our advisory services, see our Form ADV Brochure on IAPD on <https://adviserinfo.sec.gov/firm/summary/112112>.

If you have any questions with your investments, account or financial professional, contact us directly at 610-993-9100.

Key questions to ask. Ask our financial professionals these key questions for additional information.

1. Who is my primary contact person?
2. Is he or she a representative of an investment adviser?
3. Who can I talk to if I have concerns about how this person is treating me?



FORM CRS

March 27, 2023

Introduction

Stanley-Laman Group Securities (“SLGS”) is a limited broker dealer registered with the Securities and Exchange Commission. SLGS arranges selling agreements with insurance companies for the sale of Variable Life Insurance (“VUL”) policies. This document gives you a summary of the types of services we offer and the fees that we charge. You may also visit Investor.gov/CRS for free and simple tools that are available to research firms and financial professionals, which also provides educational materials about broker-dealers, investment advisers, and investing. Please feel free to ask us for more information if needed.

Relationships and Services

What investment services and advice can you provide me? Our firm’s exclusive service is the sale of Variable Life Insurance products. Premiums paid into VUL policies are deposited into various investment accounts (sub-accounts) offered by the respective insurance company and selected by the policy owner. Decisions regarding the purchase or sale of investment sub-accounts are made by the owner of the VUL policy. We do not make recommendations regarding investment sub-account allocations.

Annual and/or quarterly policy statements are typically provided by the insurance company on its schedule provided in the insurance companies prospectus.

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay? SLGS does not charge fees for the sale of VUL policies, but is paid commissions for the sale of policies from the insurance company. Fees in the form of “loads” are charged on VUL policy and are specified in the insurance company’s policy prospectus which should be requested and reviewed. Policy values in a VUL policy are impacted by subaccount performance and the expenses that are charged. You may lose money on your subaccount investments. Likewise, fees and costs will reduce any amount of money you make on the investments within the policy over time. Please make sure you understand what fees and costs you are paying.

How do your financial professionals make money? SLGS receives third-party payment in the form of commissions paid by the insurance carrier(s) from the issuance and renewals of a VUL policy.

Our Obligations to You. *We must abide by certain laws and regulations in our interactions with you.*

We *do not* provide recommendations. 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 services we provide you.

Disciplinary History

Do you or your financial professionals have legal or disciplinary history? We have no legal or disciplinary events. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Additional Information

For additional information on our services, visit Investor.gov, BrokerCheck (BrokerCheck.Finra.org) or contact us directly at 610-993-9100.

Key Questions to Ask. *Ask our financial professionals these key questions for additional information.*

1. Given my financial situation, why should I choose a brokerage service?
2. What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?
3. Tell me how you and your firm make money in connection with my policy. Do you or your firm receive any payments from anyone besides me in connection with my premium payments and policy investments?
4. What are the most common conflicts of interest in your policy? Explain how you will address those conflicts when providing services to my policy.
5. Do you have any disciplinary history? For what type of conduct?
6. Who is my primary contact person? What can you tell me about his/her legal obligations to me? If I have concerns about how this person is treating me, who can I talk to?