

Perigee Securities LP
Form CRS Customer Relationship Summary
June 30, 2020

1. Introduction:

Perigee Securities LP is registered with the Securities and Exchange Commission (SEC) as a broker-dealer and is a member of the Financial Industry Regulatory Authority (FINRA) and the Securities Investor Protection Corporation (SIPC). *Perigee Securities LP* (“*Perigee*”) is exclusively a broker-dealer and does not provide advisory services. This document gives you a summary of the types of services we provide and how you pay for those services. There are different ways you can get help with your investments. You should carefully consider which types of accounts and services are right for you. 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, which also provides educational materials about broker-dealers, investment advisers, and investing.

2. Relationships and Services:

Perigee offers variable insurance policies and investments in a variety of Tax Equity Funds for its retail customers. There are different ways to receive assistance with your investments. Perigee works predominantly in the realm of assisting clients with large federal and state tax liabilities to mitigate those liabilities through investments which may also facilitate the client’s ESG initiatives. If you invest through Perigee, Perigee will receive a commission from each fund in which you invest. While Perigee Securities LP will make recommendations that it believes meets an investor’s objectives, it is the responsibility of the investor to ultimately decide whether to make the investment. Tax Equity Funds are offerings in units of limited liability company memberships interests in entities which intend to, directly or indirectly through an “Intermediate Entity” or “Intermediate Entities” affiliated with the Managing Member, acquire, own, hold, manage, sell or otherwise dispose of ownership interests in various limited liability companies or limited partnerships a “Project Partnership” whose primary purpose is to invest in Renewable Energy Properties, Federal Historic Preservation Projects, Federal Affordable Housing, State Historic Rehabilitation and State Affordable Housing Projects in the United States that are expected to generate federal tax credits under the Internal Revenue Code or qualify for state tax credits under their respective state revenue provisions. The minimum investment accepted from outside investors is typically around \$10,000.00. In addition to identifying Tax Equity Funds appropriate for an investor, Perigee also monitors those federal Tax Equity Funds on a quarterly basis and provides annual reports for investors. In order to be a client of Perigee, a potential investor must be considered an Accredited Investor, as defined by the SEC. Perigee offers a limited selection of investments. Other firms could offer a wider range of choices, some of which might have lower costs.

For additional information, please see Rule 17a-14 under the Securities Exchange Act of 1934.

3. Standard of Conduct – Our Obligations to You:

We must act in your best interest and not place our interests ahead of yours when we recommend an investment or investment strategy involving securities. When we provide any service to you, we must treat you fairly and comply with a number of specific obligations. Unless we agree otherwise, we are not required to monitor your portfolio or investments on an ongoing basis. Our interests can conflict with your interests. When we provide recommendations, we must eliminate these conflicts or tell you about them and in some cases reduce them.

4. Fees and Costs:

Fees and costs affect the value of our account over time. Funds in which a client invests may pay the Managing Member and its Affiliates certain fees, reimbursements, distributions and other compensation during the various phases of the organization, operation and termination of the Company. In addition, the Managing Member and/or its Affiliates may receive certain fees, reimbursements, distributions and other compensation during the various phases of the organization, operation and termination of an Intermediate Entity or a Project Partnership. Your investment will be inclusive of all fund fees and expenses. Furthermore, the Fund in which you invest will pay Perigee a commission for each such investment based on its size. Perigee charges the retail investor no fees. Nevertheless, the more investments a retail investor makes through Perigee, the more fees Perigee will earn. **All Funds shall incur these fees and expenses whether you make or lose money on your investments. Fees and costs may reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.**

5. Comparisons to Other Advisors:

With respect to Tax Equity Investing often other advisors including accountants and attorneys can be employed to review Perigee's recommendations. These advisors:

- May provide advice on an ongoing basis.
- Charge for their services on an hourly basis.
- Are held to a fiduciary standard in providing that advice;
- Are regulated by state bar and accounting associations; and
- Can assist in the preparation of income tax filings.

6. Conflicts of Interest:

We benefit from our recommendations to you. Perigee has a financial incentive to offer or recommend to retail investors to invest in Tax Equity Funds because they are issued, sponsored or managed by affiliates of Perigee, and Perigee receives commissions for raising capital for these Tax Equity Funds. In turn, Perigee's registered representatives receive commissions from Perigee based on the volume of equity raised for these same Funds. Perigee also has an incentive to offer or recommend the Tax Equity Funds because there is overlapping ownership between the owners of Perigee and the sponsors and managers of the Tax Equity Funds.

7. Additional Information:

We encourage you to seek out additional information. Visit Investor.gov for a free and simple research tool to research our firm and our financial professionals. To report a problem to the SEC, visit www.Investor.gov or call the SEC's toll-free investor assistance line at (800) 732-0330. To report a problem to FINRA, please dial (301) 590-6500. If you have a problem with your investments, your account or one of our professionals, contact us in writing at:

Perigee Securities LP
c/o George Strobel
1990 Main St., PH #11
Sarasota, FL 34236

For additional information about Perigee, and its services visit Brokercheck.Finra.org, perigeegroup.com and review your account agreement. Also, to reach BrokerCheck at FINRA by phone, dial toll free (800) 289-9999.

8. Key Questions to Ask:

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

1. Given my tax and financial situation, why should I open an account with Perigee?
2. What additional costs should I expect as a result of my investment?
3. Tell me how you and your firm make money from my account. Do you or your firm receive any payments from anyone besides me in connection with my investment?
4. What are the risks associated with my investment?
5. How often will I receive performance reports?
6. Explain how the conflicts of interest inherent in this investment are addressed?
7. Do you or your firm have a disciplinary history? For what reasons?
8. What is your relevant experience, including your licenses, education and other qualifications? Please explain what the abbreviations in your licenses are and what they mean.
9. Who is the primary contact person for my account, and is he or she a representative of Perigee? What can you tell me about his or her legal obligations to me? If I have concerns about how this person is treating me, who can I talk to?