

Perceptive Edge Investment Management, Inc.
Form CRS – Client Relationship Summary
June 2020

Introduction

Perceptive Edge Investment Management, Inc. (Perceptive Edge), is an investment advisor registered with the Securities and Exchange Commission. We feel that it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provide educational materials about investment advisers, broker-dealers and investing.

What types of investment services and advice can you provide me?

As an SEC registered investment adviser, Perceptive Edge offers its investment advisory services to retail investors. Our fees are paid on a fixed fee, hourly fee, or asset-based fee based on the value of cash and investments in your account. Our advisory services include wealth management, financial planning, estate planning, retirement planning, and charitable giving. If you become a client of our firm, we will meet with you to understand your current financial situation, existing resources, goals, and risk tolerance. Based on what we learn, we will recommend a portfolio of investments that is regularly monitored, and if necessary, rebalanced to meet your changing needs, stated goals and objectives.

Our accounts can either be managed on a discretionary basis or non-discretionary basis. Accounts managed on a discretionary basis mean that we do not need to call you when buying or selling in your account. For non-discretionary accounts, we will speak with you before buying or selling in your account. You will sign an investment management agreement which will outline our level of authority. This agreement will remain in place until you or we terminate the relationship. Additional information about our advisory services is located in Item 4 of our Firm Brochure which is available online at www.adviserinfo.sec.gov.

Questions to Ask Us:

- 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?

What fees and costs will I pay?

Fees and costs affect the value of your account over time. Please ask your adviser to give you personalized information on the fees and costs that you will pay. You will be charged fees for our services based on the type of service we provide. For specific projects, you will pay an hourly or fixed fee which is typically paid at the end of a project. For ongoing management, you will either be charged an annual retainer fee which is charged quarterly, or an ongoing percentage of assets which is charged on a quarterly basis based on the value of your investments. Our hourly fee for projects ranges from \$200 to \$400 per hour, depending on the level of expertise required by the project. Our annual retainer fees typically range from \$2,000 to \$20,000. Our fees based on a percentage of assets is typically 1.00% or less, per year, depending on the value of the investments in your account.

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Our fees vary and are negotiable. Our incentive is to increase the value of your account over time which will increase our fees over time. Our fees are either deducted from your account or billed to you.

The custodian that holds your assets can charge you a transaction fee when we buy or sell an investment for you. The custodian's transactions fees are in addition to our advisory fee for our investment advisory service. You could also pay charges imposed by the custodian holding your accounts for certain investments and maintaining your account. Some investments, such as mutual funds and exchange traded funds charge additional fees that will reduce the value of your investments over time.

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. Additional information about our fees is located in Item 5 of our Firm Brochure. Our Firm Brochure is available online at www.adviserinfo.sec.gov.

Questions to Ask Us:

- Help me understand how these fees and costs will 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?
- How do you determine what fee I will be charged?

What are your legal obligations to me when acting as my investment adviser? How does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have a fiduciary duty to place your interest ahead of our own and our firm. Additional information about our potential conflicts of interest can be found in our Firm Brochure under Item 11 which is available online at www.adviserinfo.sec.gov.

Our firm's revenue is from the advisory fees we collect from you and/or your accounts. Our financial professionals are employees of the firm and are paid on a salary basis.

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

No, our firm and/or financial professionals do not have any legal and disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD #119436. You may also contact our firm at (952) 476-2770 and talk to any one of our investment professionals or support staff.

Questions to Ask Us:

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?