

Pacific Park Financial, Inc.
Form CRS Customer Relationship Summary, June 10, 2020

Introduction	<i>Pacific Park Financial, Inc.</i> is registered with the Securities and Exchange Commission (SEC) as an investment adviser. 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 investor.gov/CRS, which also provides educational materials about broker-dealers, investment adviser, and investing.
What investment services and advice can you provide me?	<p>We offer investment advisory services, including portfolio management services, to individuals, families, businesses, pensions, trusts, estates and/or charitable organizations. We offer advice on a wide variety of investment types, including exchange-listed securities like stocks and ETFs, over-the counter securities, corporate fixed income securities, CDs, municipal securities, mutual funds, variable life insurance, variable annuities and U.S. government securities. We do not require clients to maintain account minimums.</p> <p>We review all client accounts on an ongoing basis, monitoring aggregate positions daily and providing clients quarterly portfolio performance reports. We consult with clients on portfolio progress as needed or upon request.</p> <p>For additional information, please see our Form ADV, Part 2A brochure.</p> <p>Ask your financial professional—</p> <ul style="list-style-type: none"> • 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 will I pay?	<p>We charge clients an asset-based fee (.75% for total assets \$750K and greater and 1% for total assets up to \$750K) to manage their assets that is billed quarterly. The fees charged are based on the combined amount of assets under management at the quarter end.</p> <p>In addition to the asset-based fees, clients will pay management fees to fund companies for any mutual fund and ETF investments they hold. Any transactions fees for the purchase and sale of individual securities is not included in the asset based fee.</p> <p>Since the fees are asset-based, the greater the dollar amounts being managed means the greater the dollar amount in fees you will pay, and we may have an incentive to encourage you to increase the assets in your account. Please refer to the fee agreement listed in your agreement with us.</p> <p>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.</p> <p>For additional information, please see Form ADV, Part 2A brochure, Fees and Compensation and Performance Based Fees and Side by Side Management.</p> <p>Ask your financial professional—</p> <p>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?</p>
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<p>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?</p>	<p>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 affect the recommendations we provide you. Here are some examples to help you understand what this means.</p> <p>Our firm and persons associated with us are allowed to invest for their own accounts or have a financial interest in the same securities or other investments that we recommend or acquire for your account, and may own or transact in open ended mutual funds that are the same as or different than the funds recommended to or made for your account. This creates a potential conflict of interest.</p> <p>Our firm’s President, Gary Gordon, is also a licensed insurance agent and may sell insurance products to our clients if the transaction meets the client’s needs. He may earn a commission on these sales. Additionally, he writes articles on investment that he may be compensated for. These articles may discuss investment products that may be owned by the firm’s clients. These activities could present potential conflicts of interest.</p> <p>Ask your financial professional—</p> <ul style="list-style-type: none"> • How might your conflicts of interest affect me, and how will you address them? <p><i>For additional information</i>, please see Form ADV, Part 2A brochure, the Program Brochure Supplement and Code of Ethics, Participation or Interest in Client Transactions.</p>
<p>How do your financial professionals make money?</p>	<p>Our financial professionals, who are company shareholders, receive cash compensation via shareholder distributions and salary. Our financial professionals who are not company shareholders receive cash compensation via salary.</p> <p>Our financial professionals do not receive sales commissions nor are they encouraged to sell commission-based products.</p>
<p>Do your financial professionals have legal or disciplinary history?</p>	<p>No.</p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Ask your financial professional—</p> <p>As a financial professional, do you have any disciplinary history? For what type of conduct?</p>
<p>Additional Information</p>	<p><i>For additional information about our investment advisory services</i>, see our Form ADV Brochure at adviserinfo.sec.gov or visit our website at mypacificpark.com or call us at (888) 500-4279. If you would like additional, up-to-date information or a copy of this disclosure, please call (888) 500-4279.</p> <p>Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?