



OSBORNE PARTNERS

Capital Management, LLC

Osborne Partners Capital Management, LLC

Form CRS Supplement

March 17, 2023

To further expand on the Form CRS question - Do your financial professionals have legal or disciplinary history?

No, our firm does not have any legal or disciplinary history. Yes, a financial professional at our firm has a legal or disciplinary history.

In 2008, when a current Osborne employee was previously working at Charles Schwab, a customer filed a dispute regarding a money market fund that briefly fell under the standard \$1 price per share during the global financial crisis. Per the regulatory disclosure, the dispute was closed with no action.

Please click on the following link to access the employee's FINRA BrokerCheck profile:

<https://brokercheck.finra.org/individual/summary/4326570#disclosuresSection>