



SUMMARY OF MATERIAL CHANGES LETTER


Dear Client,

Enclosed, please find a Summary of Material Changes which outlines material changes to our firm's disclosure brochure, Form ADV Part 2A, since our last annual brochure update. A copy of our current disclosure brochure is enclosed for your convenient review. You may also find additional information about our firm at our website <https://weareoneseven.com/>, and through the Investment Adviser Public Disclosure system at www.adviserinfo.sec.gov.

Additionally, we would like to make you aware of the following:

1. We are required to adopt a code of ethics and provide a copy of our code of ethics to clients upon request. The current version of our code of ethics is available to you by contacting our firm at the telephone number or email address listed above.
2. Contact your advisory representative immediately if you have had any changes in your investment objectives or financial circumstances. Any changes could impact how we manage your portfolio and will become part of your client file. You should also contact us at any time during the year if your investment goals or financial circumstances change.
3. Should you hold equity securities in your portfolio, you will be responsible for the voting of proxies with regard to those investments. We do not vote client proxies.
4. Finally, enclosed is a copy of our current privacy policy, which we are required to deliver to all existing clients annually.

As always, we welcome your questions and comments at any time.

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OneSeven is a registered investment adviser with the U.S. Securities and Exchange Commission (SEC). Registration with the SEC does not imply a certain level of skill or training. Certain Advisory Persons, are also registered representatives of MGO Securities Corporation, Member FINRA/SIPC ("MGOSC"). As a registered representative, securities may be offered through MGOSC. MGOSC and OneSeven are affiliated companies. Investment products are not FDIC insured, offer no bank guarantee, and may lose value.



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Since our previous annual updating amendment, dated March 31, 2026, we made the following material changes to our Form ADV.

- We have included additional information related to OneSeven's consulting services for 1031 Exchanges, as well as some of the key risks associated with investment in a resulting Delaware Statutory Trust ("DST") or Tenant in Common ("TIC") holding as a result of such 1031 Exchange. Please see Item 4 (Advisory Business), Item 5 (Fees and Compensation) and Item 8 (Methods of Analysis, Investment Strategies and Risk of Loss).
- Under Item 4 (Advisory Services), we have described how we serve Insurance Companies by providing investment advisory services on captive insurance assets.

Form ADV 2 Appendix 1 provides information about a variety of topics relating to an Advisor's business practices and conflicts of interest. In particular, this Brochure discusses wrap fee programs offering by OneSeven.

Material Changes

OneSeven is no longer accepting new clients into the Wrap Fee Program unless prior approval is received from the Chief Compliance Officer. Typically an exception will only be granted to clients that are currently in a wrap fee account /program at another firm and are transferring their assets to OneSeven. This is effective April 1, 2024.

- Since our last annual amendment on March 31, 2026, there have been no material changes.

Future Changes

From time to time, we may amend this Disclosure Brochure to reflect changes in our business practices, changes in regulations and routine annual updates as required by the securities regulators. This complete Disclosure Brochure or a Summary of Material Changes shall be provided to each Client annually and if a material change occurs in the business practices of OneSeven.

You may view the current Disclosure Brochure on-line at the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with our firm name or our CRD# 283087. You may also request a copy of this Disclosure Brochure, by contacting us at (216) 771-4242.