

FORM CRS – CLIENT RELATIONSHIP SUMMARY

ATLANTA CAPITAL MANAGEMENT COMPANY, LLC

March 14, 2025

Atlanta Capital Management Company, LLC (Atlanta Capital, our, or we) is an investment adviser registered with the Securities and Exchange Commission (SEC). While we are not a broker-dealer, our affiliates Eaton Vance Distributors, Inc. (EVD) and Morgan Stanley Distribution, Inc. (MSDI) are registered broker dealers which acts on our behalf.

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](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

Our investment services to retail investors generally involve buying and selling securities on behalf of clients in strategies selected or recommended by your financial intermediary. We offer both equity and fixed income strategies, but generally are only responsible for managing a small percentage of our retail clients' overall assets. Subject to any strategy and account parameters, we generally have full discretion to buy and sell securities in your account. Your account is monitored on an on-going basis. We have account minimums that differ across strategies and programs and range from \$50,000 to \$1,000,000 depending on the strategy. For additional information about our services, please see Items 4 and 7 of our Form ADV Part 2A.

CONVERSATION STARTERS: Ask your financial professional:

- **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?

You pay a fee to Atlanta Capital based on a percentage of the assets we manage on your behalf. The more assets you have with Atlanta Capital, the more fees we charge. As a result, we have an incentive to encourage you to increase the amount of assets we manage. We generally charge clients on a quarterly basis. Upon mutual agreement, your account may be subject to minimum fees, or additional fees for enhanced reporting. The fees we charge do not include, or may be a part of, other costs you will likely pay to third parties, including but not limited to transactional fees, custodian fees, index fees, or fees you pay to a third party intermediary such as a financial advisor, wrap program sponsor, or broker-dealer. Our advisory fees are negotiable and can differ between clients. Unless we enter into a direct investment management agreement with a client, our fees typically can be negotiable only between us and the financial intermediary, and not the client. The financial intermediary generally determines how our fees are paid, including the level and frequency of payment.

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. For additional information about the fees we charge, please see Item 5 of Atlanta Capital's Form ADV Part 2A.

CONVERSATION STARTER: Ask your financial professional:

- **Help me understand how these fees and costs may 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?**

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?

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 can affect the investment advice we provide you. Here are some examples to help you understand what this means:

- Since our fees are based on the amount of assets we manage, we may be incentivized to invest in more risky assets
- When trading, we are incentivized to favor larger clients, and clients who pay a higher fee rate

CONVERSATION STARTER: Ask your financial professional:

- **How might your conflicts of interest affect me, and how will you address them?**

How do your financial professionals make money?

Our financial professionals' compensation is generally comprised of salary, bonus, and receipt of stock in our parent company, Morgan Stanley.

Certain of our financial professionals and financial professionals associated with our affiliates are responsible for promoting our products and strategies with your financial intermediary. These affiliated employees are also registered representatives of our broker-dealer affiliates EVD and MSDI. Factors in these employees' compensation include the assets they generate for us, revenue earned by us off of the clients they generate, and the strategies and products such assets are generated in.

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

No for our investment professionals. Yes for the firm. You may visit Investor.gov/CRS for a free and simple research tool to research Atlanta Capital and our financial professionals.

CONVERSATION STARTER: Ask your financial professional:

- **As a financial professional, do you have any disciplinary history? For what type of conduct?**

For additional information about the investment advisory services provided by Atlanta Capital, we encourage you to first contact your financial representative. If you would like to contact Atlanta Capital directly, our website is <http://www.atlcap.com/contactus.php>. To obtain up-to-date information or request a copy of our Client Relationship Summary or Form ADV, please contact us directly at 404 876 9411.

CONVERSATION STARTER: Ask your financial professional:

- **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?**