

Indyfin LLC is registered with the Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.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 services are focused on matching prospective advisory clients like yourself to other registered investment advisers (what we refer to as “third-party advisers”) exclusively through our interactive website platform (<https://www.indyfin-llc.com/>). To match you to a specific third-party adviser that is appropriately suited for your specific needs, we collect a variety of information about you through our interactive website platform (such as your investment objectives, age and life stage, geographic compatibility, professional background, current asset value, and income levels). Using this information, our interactive website platform screens various third-party advisers and presents them to you for further evaluation. We are therefore considered a solicitor or promoter on behalf of such third-party advisers. We do not ultimately manage any assets, make any financial planning recommendations, or otherwise monitor or advise with respect to your financial accounts. We do not offer proprietary products. We do not have a minimum account size or investment amount to utilize our referral services; however, the third-party advisers on our platform may require such minimums. You retain sole and absolute discretion to hire a third-party adviser to whom you are matched through our interactive website platform.

More detailed information about our services may be found in [Items 4 and 7 of our Form ADV Part 2A brochure](https://adviserinfo.sec.gov/firm/brochure/293453), available at <https://adviserinfo.sec.gov/firm/brochure/293453>.

**Conversation
Starters**

- “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?

Retail investors will not incur any fees charged by us. However, the third-party adviser to whom we refer will generally charge retail investors an advisory fee. A portion of the fee that you pay to the third-party adviser will be paid by the third-party adviser to us. The specific amount to be paid by the third-party adviser to us will vary, and you should review the associated disclosure that will be provided to you in connection with the referral we make. Please also review the advisory agreement of the third-party adviser(s) we refer for a complete description of the advisory fees you will be charged. In addition, retail investors will also generally incur the following fees and costs charged by third-parties: custodian fees, account maintenance fees, product expenses such as internal expense ratios, and transaction charges.

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.

More detailed information about our fees and costs may be found in [Item 5 of our Form ADV Part 2A brochure](#).

**Conversation
Starter**

- “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?”

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, and in connection with a referral to a third-party 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:

Because we earn referral fees from the third-party advisers to whom we refer prospective retail investors, it creates a conflict of interest and a financial incentive to refer you to third-party advisers that have agreed to compensate us.

**Conversation
Starter**

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

More detailed information about our conflicts of interest may be found in [our Form ADV Part 2A brochure](#).

How do your financial professionals make money?

Our financial professionals are compensated based on referral fees from third-party advisers. They are not compensated based on the sale of a particular product and do not earn commissions.

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

No. You may visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

**Conversation
Starter**

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

Additional Information

You can find additional and up-to-date information about our investment advisory services and request a copy of the relationship summary by visiting <https://www.indyfin-llc.com/>, emailing info@indyfin-llc.com, or calling (972) 878-9522.

**Conversation
Starter**

“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?”