

November 20, 2024

Tradezy RIA, LLC Customer Relationship Summary

Tradezy RIA, LLC is registered with the United States Securities and Exchange Commission (the “SEC”) as an investment adviser and does business under the name “Tradezy RIA”.

Brokerage and investment advisory services and fees differ. It is important that you understand the difference.

Free and simple tools are available to research firms and financial professionals are available at www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers and investing.

ITEM 2: What investment services and advice can you provide me?

Tradezy RIA provides investment advisory services to retail investors via an online platform. These services include allocating a securities portfolio for clients that is derived from the portfolio of a “Trader” (individuals who regularly create and publish investment-related commentary to their subscribers), maintaining a “Proxy Account” in the manner of clients’ Trader-derived portfolios to provide clients with information relevant to their investment decisions, and assisting clients in identifying and self-reporting their investment objectives and risk profile.

Tradezy RIA does not monitor retail investors’ investments. Investment options are limited to certain stocks and ETFs listed on U.S. securities exchanges, to exclude “penny stocks” and stocks with low trading volume. We have no minimum account size since we do not establish your brokerage account, but our advice is most appropriate if you have an account of \$5,000 or more.

If you decide to use Tradezy RIA, you will be required to provide advanced, written authority to Tradezy RIA to enter orders on your behalf. This authority will allow Tradezy RIA to exercise limited discretion on your behalf, and will allow Tradezy RIA to enter orders to buy or sell investments in your account consistent with your prior consent to establish and maintain a portfolio that is derived from a certain Trader’s portfolio that you selected. Tradezy RIA does not provide brokerage accounts, but transmits trade orders to a brokerage account that you establish with another broker-dealer.

You can find more details in our Form ADV Part 2A (and particularly Items 4 and 7 of Part 2A or Items 4.A. and 5 of Part 2A Appendix 1), which can be found at www.tradezyapp.com/form-adv-2a.

You can go to our www.tradezyapp.com/crs-faq to learn more about the following questions:

- **“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?”**

ITEM 3: What fees will I pay?

You do not pay us directly. Instead, you pay a subscription fee to our publishing affiliate, Tradezy Platforms, LLC, that will vary based on which Traders you choose to subscribe to; and Tradezy Platforms pays us a portion of that fee. 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.

Since we do not host your brokerage account, we do not charge transaction fees or asset-based fees. Your external broker may charge you its own fees, including transaction fees due to trades we direct. You can find more details in our Form ADV Part 2A (and particularly Item 5), which can be found at www.tradezyapp.com/form-adv-2a. You can go to our website www.tradezyapp.com/crs-faq to learn more about the following questions: **“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, 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.

- We make money when you subscribe to a Trader, not necessarily when your investments do well. Our publishing affiliate might allow a popular Trader to stay on the platform even if the Trader’s investment style is unwise.

You can go to our website to learn more about the following question: **“How might your conflicts of interest affect me, and how will you address them?”** You can also find more details in our Form ADV Part 2A, which can be found at www.tradezyapp.com/form-adv-2a.

How do your financial professionals make money?

Our employees are salaried and may have bonus incentives depending on their role. None of them are involved in giving financial advice.

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

No. Visit www.Investor.gov/CRS for a free and simple search tool to research us. You can go to our website www.tradezyapp.com/crs-faq to learn more about the following question: **“As a financial professional, do you have any disciplinary history? For what type of conduct?”**

Additional Information

You can request additional information about our investment advisory services and request a copy of Form CRS by writing or calling Tradezy RIA at the address or telephone number set forth below:

**(647) 643 2025
32 William Penn Road
Warren, NJ
07059**

You can go to our website www.tradezyapp.com/crs-faq to learn more about the following question: **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?**