

**Alsari Wealth Management Global Advisors, LLC d/b/a: AWM Global Advisors**  
**March 21, 2024**  
**FORM CRS**

AWM Global Advisors is registered with the Securities and Exchange Commission as an investment adviser and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ and it is important for you, our client, to understand the differences. Additionally, 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. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

**What investment services and advice can you provide me?**

We offer the following investment advisory services to retail investors: **Financial Planning Services; Portfolio Management Services; and Selection of Other Advisers.**

**Account Monitoring:** If you open an investment account with our firm, as part of our standard service we will monitor your investments on a daily basis.

**Investment Authority:** We manage investment accounts on a **discretionary** basis whereby **we will decide** which investments to buy or sell for your account. We have discretion to select, retain or replace third-party managers to manage your accounts. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased or sold for your account) by providing our firm with your restrictions and guidelines in writing.

**Investment Offerings:** We offer advice on the following types of investments or products: equity securities, corporate debt securities (other than commercial paper), certificates of deposit, municipal securities, mutual fund shares, United States government securities, options contracts on securities, money market funds, REITs, ETFs, interests in partnerships investing in real estate and interests in partnerships investing in oil and gas interests.

**Account Minimums and Requirements:** In general, we require a minimum account size to open and maintain an advisory account, which may be waived in our discretion.

Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, 13 and 16 by clicking this link <https://adviserinfo.sec.gov/firm/brochure/159094>.

***Key Questions to 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?**

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services.

- **Asset Based Fees** - Payable quarterly in advance. Since the fees we receive are asset-based (i.e. based on the value of your account), we have an incentive to increase your account value which creates a conflict;
- Third party advisory fees are included in the asset based fee.

Examples of the most common fees and costs applicable to our clients are:

- Custodian fees;
- Account maintenance fees;
- Fees related to mutual funds and exchange-traded funds;
- Transaction charges when purchasing or selling securities; and
- Other product-level fees associated with your investments

**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 detailed information, refer to our Form ADV Part 2A by clicking this link <https://adviserinfo.sec.gov/firm/brochure/159094>.

**Key Questions to Ask Your Financial Professional**

- **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.

- Ali Alsari, Chief Executive Officer of our firm, is the sole owner of Alhambra Wealth Management, a Cayman Islands Investment Adviser and Alhambra Bank and Trust, a Cayman Islands banking institution, (collectively "Alhambra"), entities registered in the Cayman Islands that work exclusively with non-U.S. persons. Non-U.S. clients of our firm may be solicited to transfer their accounts to Alhambra. Fees and services provided by Alhambra are separate and apart from those of our firm.

**Key Questions to Ask Your Financial Professional**

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

Refer to our Form ADV Part 2A by clicking this link <https://adviserinfo.sec.gov/firm/brochure/159094> to help you understand what conflicts exist

**How do your financial professionals make money?**

The only compensation our firm receives is from the revenues generated by the fees we charge on the assets we manage. Our financial professional's compensation is based on a percentage of the revenues produced by the accounts they service. They receive a set salary plus the possibility of a bonus based on the revenues generated by their clients. In addition, to the extent that Alhambra entities are profitable, Ali Alsari may receive as compensation a distribution from a portion of the profits.

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

Yes, our firm or our financial professionals currently have legal or disciplinary history to disclose. These events are disclosed in either our Form ADV or the specific individual's Form U4. These documents can be found by going to [Investor.gov/CRS](http://Investor.gov/CRS).

**Key Questions to Ask Your Financial Professional**

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at 619-225-7604 or click the link provided <https://adviserinfo.sec.gov/firm/brochure/159094>

**Key Questions to 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?**