



Client Relationship Summary - February 2024

Relationship Summary for Alooola, LLC

alooola, LLC is a registered Investment Advisor with the Securities and Exchange Commission. Investment advisory services and brokerage fees differ. It is important to understand the differences. Free and simple tools are available to research firms and financial professionals at www.investor.gov which also provides educational materials about investment advisers, broker-dealers, and investing.

What investment services and advice can you provide me?

alooola, LLC focuses on providing financial advice to a diverse and customarily under-served population of young professionals with a long-term time horizon to retirement using a personalized and technologically-driven platform. alooola, LLC seeks to increase the long-term financial stability and wealth of its clients through a process that is supported by an advisory team and a technology platform originated by alooola, LLC. Prospective clients may be attracted to the service for its fee schedule, its reliance on technology, or the remote advisory services offered to support the client.

alooola, LLC Advisory Management Program

This program only provides the client the investment management services of the investment adviser for a fee based on the level of client assets in the managed accounts. This program does not include coverage for all security transaction costs, nor will there be a performance report generated. Such services can be added by our affiliated entities for additional costs. All alooola, LLC accounts are discretionary. Please see alooola's ADV at www.alooola.com and/or contact alooola's Chief Compliance Officer at 484-275-5525.

Questions to ask us to start a conversation¹	<input type="checkbox"/> <i>Given my financial situation, should I choose an investment advisory service? Why or why not?</i>
	<input type="checkbox"/> <i>How will you choose investments to recommend to me?</i>
	<input type="checkbox"/> <i>What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?</i>

What Fees Will I Pay?

All alooola clients participate in the alooola's tiered fee program as described below: The tiered fee program includes asset management services provided by alooola, and securities transaction costs (ticket charges, transaction service fees) for the trades done under the program. There is an additional \$5 administrative fee charged at account initiation annually.

Tier	AUM	Annual Client Fee
Tier 1	<\$25,000	0.25% AUM plus admin fee of \$5 annually
Tier 2	>\$25,000	0.50% of AUM plus admin fee of \$5 annually
Tier 3*	NA	No AUM or Admin charges
Tier 4**	NA	Fees waived for full time students; \$5 admin fee annually.
401(k) Sponsor	NA	0.1%-1% per annum

*Tier 3 clients are 401k plan participants. ** Tier 4 clients are full-time students.
For more information on fee structure please contact alooolas's CCO at 484-2755525.

You will pay a tiered fee according to the table above. Fees will reduce client account balances as they are deducted. Please make sure you understand what fees and costs you are paying.

<i>Questions to ask us to start a conversation</i>	<input type="checkbox"/> <i>Help me understand how these fees and costs might affect my investments. If I give you \$1,000 to invest, how much will go to fees and costs, and how much will be left to invest for me?</i>
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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 alooola, LLC act as your investment adviser, we must act in your best interest and not put our own interest ahead of yours. However, the way we make money can create some conflicts. You should understand and ask us about conflicts because they can affect the investment advice we provide to you. alooola, LLC is affiliated with Glen Eagle Wealth, LLC, ("GEW"), a FINRA registered broker-dealer and Glen Eagle Advisors, LLC ("GEA") an SEC-registered investment advisor. Registered personnel of alooola, LLC, may also engage in the activities on behalf of GEW and GEA and such work may be provided at the expense of alooola, LLC. In addition, registered personnel of alooola, LLC may recommend products from GEW/GEA which may result in additional fees that could directly or indirectly benefit the recommending registered person. See form ADV or contact the CCO for more information.

<i>Questions to ask us to start a conversation</i>	<input type="checkbox"/> <i>How might your conflicts of interest affect me, and how will you address them?</i>
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How do your financial professionals make money?

Alooola personnel receive a salary and other regular annual compensation, an annual bonus, as determined by senior management or a percentage of fees earned in accounts they service, which could incentivize such advisor to sell as much as possible.

<i>Questions to ask us to start a conversation</i>	<input type="checkbox"/> <i>As a financial professional, do you have any disciplinary history and if so, for what type of conduct?</i>
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You may find additional information about our investment advisory services and request a copy of this relationship summary at info@aloola.com or by calling 484-275-5525.

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

No. You can get more information on our professionals at www.Investor.gov.

<i>Questions to ask us to start a conversation</i>	<input type="checkbox"/> <i>Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer?</i> <input type="checkbox"/> <i>Who can I talk to if I have concerns about how this person is treating me?</i>
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You can contact alooola's Chief Compliance Officer at 484-275-5525 for any issues or contact us via email at compliance@aloola.com.