

SHARE INVEST INC. Form ADV, Part 3 - Customer Relationship Summary (March 7, 2024)

Introduction	SHARE INVEST INC. ("Share") is an investment adviser registered with the Securities and Exchange Commission (the "SEC"). Brokerage and investment advisory services and fees differ, and it is important that you understand the differences. The SEC provides free educational materials about investment advisers, brokerage services, and investing and offers simple tools to help you research firms and financial professionals at www.investor.gov/CRS .
What investment services and advice can you provide me?	Share offers non-discretionary advisory services to retail investors in individual taxable accounts. Share provides personalized, long-term oriented investment portfolios that are invested in our proprietary equity Strategies. We use the information from a suitability questionnaire to recommend Strategies in accordance with your investment risk and financial parameters and objectives.
Account Minimums and Other Requirements	Share requires a minimum investment of \$1 for recurring and one-time investments. Share may increase the minimum for specific Strategies. Share requires that you use Alpaca Securities LLC ("Alpaca"), an unaffiliated broker-dealer, as your independent custodian.
Monitoring of Accounts	<p>Share monitors Strategies and the securities contained therein, both in response to market news and events, and on a periodic basis not less than quarterly. You will be notified of any changes to Strategies in which you are invested and have the ability to accept or reject the changes in your own account.</p> <p>For more information about our services, please see Share's Form ADV, Part 2A ("Brochure"), which will be available on Share's website and on the SEC's IAPD database at www.adviserinfo.sec.gov upon successful registration.</p> <p>Conversation Starters</p> <p><i>Given my financial situation, should I choose an investment advisory service? Why or why not?</i></p> <p><i>How will you choose investments to recommend to me?</i></p> <p><i>What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?</i></p>
What fees will I pay?	<p>Share charges a flat fee of \$5 per month, or \$50 per year if you opt to prepay annually.</p> <p>You may incur third party fees (transfer fees, brokerage fees, administrative fees etc.).</p> <p>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</p>

	<p>make on your investments over time. Please make sure you understand what fees and costs you are paying. For additional information, please see our Brochure.</p> <p>Conversation Starters <i>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?</i></p>
<p>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?</p>	<p>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.</p> <p>Share does not offer proprietary products or participate in revenue sharing, third-party payments, or principal trading.</p> <p>Individuals associated with Share may buy or sell or have an interest in securities recommended to you, which may create a conflict of interest. For more information on how we manage potential conflicts of interest, see our Brochure</p> <p>Conversation Starters <i>How might your conflicts of interest affect me, and how will you address them?</i></p>
<p>How do your financial professionals make money?</p>	<p>Our financial professionals are compensated through an annual salary.</p>
<p>Do you or your financial professionals have legal or disciplinary history?</p>	<p>No. You are encouraged to visit www.investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starters <i>As a financial professional, do you have any disciplinary history? For what type of conduct?</i></p>
<p>Addition Information</p>	<p>For more information about our investment advisory services, please see www.tryshare.app and Share's Brochure. You can also request additional, up-to-date information or a copy of this Relationship Summary by visiting www.tryshare.app or calling us at (914) 677-1039.</p> <p>Conversation Starters <i>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?</i></p>