

Zacks Intelligence LLC
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY
November 8, 2024

Item 1. <u>Introduction</u>	Zacks Intelligence LLC (" <i>Zacks Intelligence</i> ") is registered with the Securities and Exchange Commission (" <i>SEC</i> ") as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS , which also provides educational materials about broker-dealers, investment adviser, and investing.
Item 2. <u>Relationships and Services</u>	<p>What investment services and advice can you provide me?</p> <p>We offer investment advisory services to retail investors, through an interactive, online platform that uses artificial intelligence and large language models to generate investment recommendations, investment guidance, and financial/market related information based on queries from the platform's users (our "<i>Service</i>"). Our Service is provided using data from research reports, general financial principles, and other historical and general data. The Service is not tailored to any person's personal financial needs/goals, individual circumstances, or risk tolerance.</p> <p>Monitoring We do not manage any assets or provide monitoring or review of any investment accounts.</p> <p>Investment Authority We do not manage any assets. Therefore, we do not exercise any investment authority.</p> <p>Limited Investment Offering Our investment advice is limited to non-tailored investment recommendations, investment guidance, and financial/market related information.</p> <p>Account Minimums and Other Requirements There is no fee or minimum level of wealth required to use our platform.</p> <p>More Additional information about our services is available on Part 2 of our Form ADV, which is available here.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none">• 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. <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	<p>A. What fees will I pay?</p> <p>We do not charge any fees to use our platform. We may receive compensation from 3rd parties for promoting their products and services, and we may receive direct or indirect compensation from our affiliates, Zacks Investment Management, Inc. ("<i>ZIM</i>") and Zacks Investment Research, Inc. ("<i>ZIR</i>" and together with ZIM, our "<i>Affiliates</i>") for recommending their products and services to you. This creates a conflict of interest, as we have an incentive to promote these product/service offerings to you.</p> <p>ZIM is an SEC registered investment adviser that charges customary fees to manage investment advisory accounts, separate accounts, public and private pooled investment vehicles and wrap-fee programs. ZIR is a provider of market data services over the Internet that primarily charges one-time and subscription-based fees for full-text brokerage research reports, investment newsletters and other investment publications.</p> <p>Additional information about our firm's fees is included in Item 5 of Part 2 of Form ADV, available here.</p> <p>You may also incur certain fees or charges imposed by 3rd parties or our Affiliates if you decide to purchase their products or retain their services. And you may incur certain fees or charges imposed by 3rd parties in connection with your investments.</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 make on your investments over time. You will not pay us any fees. Please make sure you understand what fees and costs you are paying.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• 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?

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<p>Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p>	<p>B. 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><i>When we act as your investment adviser,</i> 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 to you. Here is an example to help you understand what this means.</p> <ul style="list-style-type: none">• We may receive compensation from independent 3rd parties and direct or indirect compensation from our Affiliates for promoting their products and services to you. We have a conflict of interest to recommend such products/services to you because we may receive compensation for doing so, and in certain in cases—we may receive compensation when you purchase a recommended product or retain recommended services. <p><i>Conversation Starter.</i> Ask your financial professional—</p> <ul style="list-style-type: none">• How might your conflicts of interest affect me, and how will you address them? <p>More Additional information about conflicts of interest between Zacks Intelligence and our clients is available on Part 2 of our Form ADV, which is available at here.</p> <p>How do your financial professionals make money? Our professionals receive a salary.</p>
<p>Item 4. <u>Disciplinary History</u></p>	<p>Do you or your financial professionals have legal or disciplinary history? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p><i>Conversation Starter.</i> Ask your financial professional—</p> <ul style="list-style-type: none">• As a financial professional, do you have any disciplinary history? For what type of conduct?
<p>Item 5. <u>Additional Information</u></p>	<p><i>Additional information about our services</i> can be found at here. If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact us at 312.265.9500.</p> <p><i>Conversation Starter.</i> Ask your financial professional—</p> <ul style="list-style-type: none">• 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?