

Global AutoTrading

Form CRS Customer Relationship Summary, January 31, 2024

Introduction	<p>Global AutoTrading is registered with the Securities and Exchange Commission (SEC) 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.</p>
What investment services and advice can you provide me?	<p>We offer autotrading services to retail investors, meaning that we implement in our clients' brokerage accounts US equity & option buy & sell instructions from investment newsletters that our clients have chosen themselves and have a paid subscription to. Our clients give us exclusive limited trading authorization to trade in their brokerage account held with a broker that is compatible with our autotrading system. We do not have account minimums, but brokers may have their own account minimums. Once a client has configured their autotrading parameters, Global AutoTrading will automatically implement & monitor newsletter buy & sell instructions without further confirmation from the client. Clients can adjust their parameters at any time to control future orders. For additional information, please see our Form ADV, Part 2A brochure.</p> <p>Conversation Starters. Ask us—</p> <ul style="list-style-type: none">• Given my financial situation, should I use an autotrading service or 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?	<p>We charge a monthly fee per account based on the number of newsletters being autotraded in the account, as well as the net liquidity of the account for accounts larger than \$100k. One newsletter costs \$70 per month; a second newsletter costs an additional \$30 per month; and each subsequent newsletter costs an additional \$10 per month. For accounts larger than \$100k, the high-water mark of the funds in use for trading for the month is divided by \$100k to come up with a scaling factor that is multiplied by the fee computed above. Thus, an account that has \$150k invested in a given month and that is autotrading a single newsletter would pay $\\$70 \times 1.5 = \\105 per month. These fees are non-negotiable and are payable monthly at the beginning of the billing period. These fees will be taken from a credit card, PayPal account or transferred from the client's brokerage account to Global AutoTrading's account. These fees are non-refundable. If a subscription to Global AutoTrading's autotrading service is terminated with at least 1 day prior to the next billing date, there will be no further subscription charges to the client, but there will be no refund for the remainder of the period of the subscription.</p> <p>You will also incur brokerage and other transaction costs that are charged directly by the broker, as well as any newsletter subscription fees.</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. Please make sure you understand what fees and costs you are paying.</p>

	<p>For additional information, please see Form ADV, Part 2A brochure.</p> <p>Conversation Starter. Ask us—</p> <ul style="list-style-type: none"> • Help me understand how these fees and costs might affect my investments. If my brokerage account has \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?
<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 affect the recommendations we provide you. Here are some examples to help you understand what this means.</p> <p>Global AutoTrading may receive compensation for each new client introduced to some brokers, and/or ongoing payments from some brokers. Clients usually choose their own broker, but if clients ask us which broker they should use we would mention any compensation that we would receive when suggesting a broker. Some newsletters may also pay our monthly autotrading fee on behalf of their clients.</p> <p>Conversation Starter. Ask us—</p> <ul style="list-style-type: none"> • How might your conflicts of interest affect me, and how will you address them? <p>For additional information, please see Form ADV, Part 2A brochure.</p>
<p>How do your financial professionals make money?</p>	<p>Our staff are paid a salary and a bonus based on the firm's total revenue.</p>
<p>Do your financial professionals have legal or disciplinary history?</p>	<p>Neither Global AutoTrading nor any of our staff have legal or disciplinary history.</p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter. Ask us—</p> <ul style="list-style-type: none"> • As a financial professional, do you have any disciplinary history? For what type of conduct?
<p>Additional Information</p>	<p>For additional information about our services, please see our web site, and our Form ADV, Part 2A brochure. If you would like additional, up-to-date information or a copy of this disclosure, please contact us using our web site.</p> <p>Conversation Starter. Ask us—</p> <ul style="list-style-type: none"> • Who is my primary contact person? Is he or she a representative of an investment-adviser? Who can I talk to if I have concerns about how this person is treating me?