

AMERICAN ALPHA ADVISORS, LLC D/B/A DOMANI ADVISORS  
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

March 28, 2024

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### Item 1 – Introduction

American Alpha Advisors, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. It is important for you to understand the differences between brokerage and investment advisory services. Fees for these services differ as well. Free and simple tools are available to research firms and financial professionals online at [Investor.gov/CRS](https://Investor.gov/CRS). This site also provides educational materials about broker-dealers, investment advisers, and investing.

### Item 2 – Relationships & Services

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

We offer investment advisory services to retail investors, primarily, in a wrap-fee program. We also offer Investment Management and Reporting of investments across different asset classes.

Investment Management. We provide clients with ongoing portfolio management services by determining individual investment goals, time horizon, risk tolerance, return requirements, liquidity requirements, tax status, and/or other significant factors. Based on these factors, recommendations will be made regarding investment strategies, asset allocation, investment selection, portfolio monitoring and the overall investment program.

Investment Authority. Discretionary asset management allows us the limited authority to buy and sell investments in your account without asking you each time a transaction is placed. With non-discretionary asset management, we provide investment recommendations but require your approval to proceed. We request discretionary authority over all assets in your accounts with us.

Reporting Services. You may elect to hire us to monitor, oversee and report on external managers and investments for a mutually agreed upon fee to be invoiced to you. Managers can include third-party advisers, hedge fund managers, private equity managers or any other managing-member of a passive investment. Investments can include passive real estate holdings, hedge fund, private equity or any other passive investment syndication

Limited Investment Offerings. While we advise on a wide range of asset classes, our managed portfolios primarily consist of mutual funds, typically institutional share class with the lowest expense ratio available. We may use other instruments, such as, ETFs, REITs, bonds, individual stocks, or options to help diversify or hedge a portfolio.

Account Minimums and Other Requirements: We do not have a formal minimum account size. However, our decision to onboard a prospective Client may be based on the relationship size.

Additional information. Please see our Form ADV, Part 2A brochure and our WRAP Brochures 2A Appendix at <https://adviserinfo.sec.gov/firm/brochure/291796>.

*Conversation Starters. 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?*

### Item 3 – Fees, Costs, Conflicts & Standard of Conduct

*“What fees will I pay?”*

Investment Management Fees. On a monthly basis, we charge a tiered ongoing asset-based fee in arrears in accordance with the investment management agreement. The fee is charged as a percentage of your assets that we manage. The more assets there are in your advisory account, the more you will pay in fees, and we may therefore have an incentive to encourage you to increase the assets in your account.

Wrap Fees. Fees associated with any wrap fee program will include most transaction costs and fees to a broker-dealer or bank that has custody of these assets, and therefore are higher than a typical asset-based advisory fee. Paying for a wrap fee program could cost more than separately paying for advice and for transactions if there are infrequent trades in your account (please see our [Firm's WRAP Fee brochure](#) for more information).

Strategy Fees. You may elect to hire us for Investment Management services or choose to participate in a particular investment strategy with an associated Strategy Fee that is higher than the typical investment management fee.

The Strategy Fee will be disclosed to you and billed consistent with our agreement.

Reporting Services. We will monitor, oversee and report on external managers and investments for an agreed upon additional fee consistent with our agreement.

Other fees and costs related to investment advisory services and investments. Clients are subject to additional expenses, such as, mutual fund expenses, interest (margin) expense, or other fees that are separate and distinct from the fees and expenses associated with our firm and our wrap fee program.

Additional Information. 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. Please see our Form ADV, Part 2A brochure (specifically Items 5.A., B., C., and D.), WRAP Brochures Part 2A Appendix, and other applicable documents at <https://adviserinfo.sec.gov/firm/brochure/291796>.

*Conversation Starter. 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?"*

Conflicts. 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:

Custodial Services. We recommend Schwab Advisor Services, part of Charles Schwab & Co., Inc ("Schwab") as your custodian. Schwab provides access to a full range of products and services. Some of the products and services made available by Schwab may benefit us but may not benefit you as our client. Access to these resources may play a part in our choice of custodian. We address this conflict of interest by carefully vetting our custodian and putting our Clients' interests ahead of our own.

Strategy Fees. As discussed above, certain strategies have different costs associated with them. Some strategies are more profitable to our Firm than others. We eliminate this conflict by acting in your best interest and allocating across strategies consistent with your risk/return profile.

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

Additional information. Please see our Form ADV, Part 2A brochure, our WRAP Brochure 2A Appendix, and other applicable documents at <https://adviserinfo.sec.gov/firm/brochure/291796>.

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

Non-principal financial professionals at our firm are compensated based on the dollar amount of assets they manage. We do not compensate our financial professionals more based on the share of gains experienced in your account. However, it is in the financial professional's interest if the value of your account increases, by way of cash deposits or market appreciation, as the overall fee will be higher since the asset value is greater.

#### **Item 4 - Disciplinary History**

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

Neither our firm nor any of our investment advisor representatives has criminal or civil actions to report, administrative proceedings to report or self-regulatory organization (SRO) proceedings to report.

Additional information. Please see our Form ADV (Item 11 of Part 1A or Item 9 of Part 2A) at

<https://adviserinfo.sec.gov/firm/brochure/291796> or visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

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

#### **Item 5 - Additional Information**

For additional information about our services, please contact Sam Haddad at 917-810-5530 or by email at [domani@domaniadvisors.com](mailto:domani@domaniadvisors.com)

*Conversation Starter.*

- *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?*