



## FORM CRS

### May 22, 2024

#### Introduction

Designer Technologies, Inc., doing business as TRADEway ("TRADEway") is registered with the Securities and Exchange Commission as an investment advisor. Fees for brokerage and investment advisory services differ among broker-dealers and investment advisers and it is important that you understand the differences. Free and simple tools are available to research firms and financial professionals at [investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers and investing.

#### What investment services and advice can you provide me?

TRADEway offers a variety of investment advisory services to retail investors, including education, the development of model portfolios, and wealth management.

- When you engage TRADEway for Investment Education and Coaching we will provide ongoing educational opportunities centered around methods and strategies for becoming an active trader in the stock market. Our educational content is delivered through live and virtual events, on-demand courses, and webinars. Our investment coaches work with clients to develop personalized investment plans based on an individual's financial situation and investment goals.
- Charts by TRADEway is a subscription-based system for analyzing securities and interfacing with custodial trading platforms. Clients may chart and trade directly from the platform. Clients can also access research through their Charts subscription.
- Our Assisted Managed Portfolios ("AMPT") is an investment advisory program in which TRADEway creates model portfolios for clients. Clients may participate in a discretionary program, in which TRADEway makes all investment decisions and trades, or AMPT PRO, a non-discretionary program in which TRADEway provides clients with recommendations but each investor makes the ultimate decision regarding executing any trades. Client accounts are monitored at least quarterly.
- Services offered by TRADEway may be tailored for individual clients as necessary. Certain services are subject to minimum account size requirements.

You should carefully review our ADV Part 2A Brochure, which is available at <https://adviserinfo.sec.gov/firm/summary/281879>, for more information about our services.

**Please ask us the following questions to better understand our services:** 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?

#### What fees will I pay?

- Our educational products and services are individualized for an individual client's needs and budget. The one-time cost of educational and training resources varies between \$97 and \$30,000. Memberships are billed monthly, and you may cancel at any time. Individual courses and programs are also offered on an a la carte basis.
- Monthly subscriptions to Charts by TRADEway range from \$29.99 to \$59.99 monthly. Clients may cancel at any time.
- AMPT management fees are based on portfolio size and range from 0.95% to 1.85% annually. These fees are billed quarterly in arrears based on the average daily balance in your account. You should be aware that the more assets there are in your account, the more you will pay in fees. This means we have an incentive to encourage you to increase the assets in your account. Startup fees are also applicable depending on the size of a new portfolio. These startup fees range from \$250 to \$2,999. In addition to our fees, you will incur additional third-party fees and costs related to the investments in your account, such as custodian fees, account maintenance fees, wire transfer fees, internal management fees of mutual funds and ETFs, redemption fees, and other product related fees.

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. It is important that you carefully review our Form ADV Part 2A Brochure, which is available at <https://adviserinfo.sec.gov/firm/summary/281879>, for additional information about our fees.

**Please ask us the following questions to better understand the impact of fees and costs on investments:** 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 advisor? How else does your firm make money and what conflicts of interest do you have?

**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 interest. You should understand and ask us about these conflicts because they affect the investment advice that we provide you. Here are two examples to help you understand what this means.

- Your broker-dealer and custodian (which allow you to trade via the Charts platform) provide us with access to electronic systems that assist us in managing your account, as well as research, software, other technology, and discounts for products and services offered by third-party service providers. These economic benefits give TRADEway an incentive to recommend the broker-dealer or custodian over another broker-dealer and custodian that do not provide similar benefits.
- We also have a financial interest in you managing your own accounts through the Charts platform as opposed to other third-party software.
- We and our affiliates refer clients to third-party service providers and are eligible to receive additional compensation for those referrals.

**Please ask us the following question about our conflicts of interest:**

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

You should carefully review our Form ADV Part 2A, which is available at <https://adviserinfo.sec.gov/firm/summary/281879>, for more detailed information about our conflicts of interest.

## How do your financial professionals make money?

Our financial professionals receive a salary and a bonus based on the amount of assets they service. This is a conflict of interest because our financial professionals have an incentive to encourage you to increase the assets in your account.

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

No, please visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple tool to research our firm and your financial professional.

**Please ask us the following questions about our disciplinary history:** As a financial professional, do you have any disciplinary history? For what type of conduct?

## Additional Information

You can find additional information about our investment advisory services in our Form ADV Part 2A Brochure, which is available at <https://adviserinfo.sec.gov/firm/summary/281879>. You can request up -to-date information and a copy of our relationship summary by contacting us at 877-777-0703. You can reach us by mail at 158 Private Road 5489, Mexia, TX 76667

**Please ask us the following questions to better understand who to contact with any questions or complaints:** 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?

## FORM CRS Summary of Material Changes May 22, 2024

This is a summary of Material Changes to our Form CRS, which describes material changes since our Form CRS was last updated on July 3, 2023.

1. We have updated the description of investment services and advice we provide.
2. We have provided additional information regarding the fees you will pay.
3. We have updated information regarding our legal obligations to you, how else we make money and our conflicts of interest.
4. We have updated information on how our financial professionals make money.