

Form CRS Client Relationship
Summary Vela Enterprises
September 06, 2024

Item 1 – Introduction: Is an investment advisory account right for you?

This document provides you, the retail investor, with information about the types of advisory services we offer and how you pay. Use this to help you understand our services and start a conversation with your financial advisor.

Vela Enterprises is registered with the Securities and Exchange Commission (SEC) as an Investment Adviser. The SEC makes free and simple tools and educational materials available to research firms and financial professionals at investor.gov/CRS.

Item 2 – What investment services and advice can you provide me?

We offer investment advisory services through an interactive website. Here are the primary features:

- Investment authority:

We do not manage any assets. Therefore, we do not exercise any investment authority.

- Investment offerings:

Our investment advisory services are limited to making recommendations to investment categories (instead of specific securities), how to manage risk and financial education.

- Monitoring:

We do not manage any assets or provide monitoring or reviewing of any investment accounts.

- Additional Information

Vela Enterprises owns the website www.myinteractiveadvisor.com, where subscribed users can virtually simulate several financial tools such as future value, present value and rule 72.

Conversation Starters.

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 – What fees will I pay?

Vela Enterprises offers a monthly subscription of \$50, granting users access forms questionnaires. Once the user submits their data, the system automatically generates their financial investment objectives, suitable investment categories, and risk tolerance, which are then sent directly to the user's email. Throughout the subscription period, users also have access to virtual financial tools for simulation and ongoing financial education.

Conversation Starter.

What happens if I don't renew my subscription fee? What financial tools are available on virtual website?

Item 4 – Do you or your financial professionals have legal or disciplinary history?

No. Our financial advisors do not have a legal nor disciplinary history.

Please visit www.investor.gov/CRS for a free and simple search tool to research our firm and your financial advisor.

Conversation Starter.

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

Item 5 – Additional Information

If you have any questions about our investment services or would like to request a copy of this relationship summary, please contact Jose Vela at velaenterprises@myinteractiveadvisor.com.

Conversation Starters.

Who is my primary contact person?

Is he or she a representative of an investment advisor or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?