

Client Relationship Summary
Pelican Invests, LLC (CRD# 329771)

Introduction

Our firm, Pelican Invests, LLC, is registered as an investment adviser with the U.S. Securities and Exchange Commission. 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](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

Relationships and Services

What investment services and advice can you provide me?

Services: We offer investment advisory services to retail investors. We provide you with a self-guided questionnaire to identify your investment goals and objectives, as well as risk tolerance and financial situation in order to develop an investment approach. This service includes recommending portfolios and action steps so you can achieve your investment goals.

Accounts, Investments, and Monitoring: We provide services to individual accounts. We primarily use mutual funds and exchange-traded funds in recommending portfolios. We do not make available or offer advice with respect to only proprietary products or a limited menu of products or types of investments. We only make recommendations, and do not monitor portfolios and securities in accounts on a regular and continuous basis.

Investment Authority: We do not manage any accounts or investments; therefore, we have no investment authority. You will make the ultimate decision regarding the purchase or sale of investments in your accounts.

Account Minimums & Other Requirements: We do not require an account or relationship size minimum in order for you to open/maintain an account or establish a relationship.

Additional Information: For more detailed information on our relationships and services, please see Item 4 – Advisory Services, Item 13 – Review of Accounts and Item 7 – Types of Clients of our Form ADV Part 2A available via our firm's [Investment Adviser Public Disclosure Page](#).

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?*

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Monthly Fees: Our Monthly fees for investment advisory services are at a rate of \$4.99 to \$12.99 per month. Monthly fees are due upon receipt.

Other Fees & Costs: In addition to our advisory fee, you will also be responsible for custody fees, account administrative fees, fees and expenses related to mutual funds and exchange-traded funds and applicable securities transaction fees.

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. For more detailed information on our fees, please see Item 5 – Fees and Compensation of our Form ADV Part 2A available via our firm's [Investment Adviser Public Disclosure Page](#).

Conversation Starters: *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?

When we act as your investment adviser, we have to act in your best interest and not put our interests 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 is an example to help you understand what this means.

We are affiliated and under common control with Pelican Gift Inc., which provides online self-help solutions for education saving and planning needs. When you visit Pelican Gift Inc.'s website, you may be referred to us for investment advisory services. This creates a conflict of interest for us as we have an incentive to offer you both our services and Pelican Gift Inc.'s.

Additional Information: For more detailed information, please see Item 10 – Financial Industry Activities and Affiliations, Item 12 – Brokerage Practices and Item 14 – Client Referrals and Other Compensation of our Form ADV Part 2A available via our firm's [Investment Adviser Public Disclosure Page](#).

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

How do your financial professionals make money?

Our financial professionals are compensated based on the revenue generated from advisory services, which is distributed in accordance with our partnership agreement. This means our financial professionals have an incentive to increase the asset size in the relationship or solicit new business, taking time away from the day-to-day servicing of existing clients.

Disciplinary History

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

No. You can visit [Investor.gov/CRS](https://www.investor.gov/crs) for a free and simple search tool to research our firm and our financial professionals.

Conversation Starters: *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 by viewing our Form ADV Part 2A available via our firm's [Investment Adviser Public Disclosure Page](#) or by visiting <https://www.pelicaninvests.com>. You can request up to date information and a copy of our Client Relationship Summary by contacting us at Hello@pelicaninvests.com or 347-450-1767.

Conversation Starters: *Who is my primary contact person? Is he or she a representative of an investment advisor? Who can I talk to if I have concerns about how this person is treating me?*