ADDIGENCE CORPORATION

February 2025
ADV Part 3
FORM CRS (CLIENT RELATIONSHIP SUMMARY)

1. INTRODUCTION

Addigence Corporation ("we, "us", "our", or "Addigence") is registered with the Securities and Exchange Commission (SEC) as an internet-based investment adviser. Investment advisory and brokerage services differ, and it is important to understand these differences. Free and simple tools are available to research firms and professionals on Investor.gov/CRS, which provides educational resources on investment advisers, broker-dealers, and general investing.

2. RELATIONSHIPS AND SERVICES

What investment services and advice can you provide me?

We offer investment strategies provided by Portfolio Managers ("PMs") through our interactive web platform. Addigence does not offer proprietary investment products, and clients have access only to a limited menu of investment strategies available on our platform. Our platform allows you to review strategies, select portfolio managers, and allocate your assets in a way that suits your investment objectives and risk profile.

We provide discretionary investment management**,** which means that once you allocate funds to a PM Strategy, Addigence makes all trading decisions on your behalf in accordance with the selected strategy. Clients cannot override or modify trades made within the chosen strategy. We monitor investments to ensure alignment with your risk profile and objectives.

Conversation Starters – Ask your financial professional:

- Given my financial situation, should I choose an investment advisory service? Why or why not?
- How will you select investments for me?
- What is your relevant experience, including licenses, education, and other qualifications? What do these qualifications mean?

3. FEES, COSTS, CONFLICTS AND STANDARD OF CONDUCT

What fees will I pay?

Our fees include both a performance-based component and a fixed annual platform licensing fee. The performance-based fee is charged as a percentage of any realized or unrealized gains in your portfolio only if it exceeds a high-water mark. These fees are transparent and disclosed on the platform, tailored to each Portfolio Manager's strategy. We do not earn commissions from trades or products, but you may incur additional fees from custodians or transaction costs. However, clients still incur other costs**,** including custodian fees, brokerage transaction fees, and potential third-party data costs**.**

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.

Visit Investor.gov/CRS for more information.

Is there a Minimum Investment Requirement?

We generally require a minimum investment of $100,000. Addigence only serves Qualified Clients, which the SEC defines as individuals with at least $1.1 million in assets under management or a net worth exceeding $2.2 million (excluding primary residence).

More information is available in our **ADV Part 2A** at adviserinfo.sec.gov

Frequently Asked Questions:

- Do you monitor my accounts?

Yes. Addigence provides continuous monitoring of strategies and ongoing analysis to ensure alignment with your selected risk profile and investment objectives.

- Do you make investment decisions for me?

Yes. We operate on a discretionary basis, managing your assets in line with the strategy (or strategies) you select from our platform.

- Minimum Investment

We generally require a minimum of $100,000, though we may accept smaller accounts based on individual circumstances. Importantly, Addigence only serves Qualified Clients. For the current definitions of Qualified Clients visit SEC Qualified Client Fact Sheet. Additional information can be found in our ADV Part 2A which is available at adviserinfo.sec.gov/.

Conversation Starters – Ask your financial professional:

- 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 fees will I pay, and how might they change over time?
- How do these fees affect my investment returns?
- If I pay fees based on performance, how does that influence your recommendations?

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 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. Our performance-based fee structure creates a potential conflict of interest, as Addigence benefits when your account balance increases. This may create an incentive for us to recommend riskier strategies with higher return potential.

Conversation Starters – Ask your financial professional:

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

As your adviser, we are obligated to act in your best interest. Please see the more detailed disclosure on our conflicts of interest in our **ADV Part 2A**, which is available at adviserinfo.sec.gov.

How do your financial professionals make money?

We pay our financial professionals a salary and discretionary bonus based on their performance. They do not receive commissions or compensation tied to specific investment products.

4. DISCIPLINARY HISTORY

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

No.

Neither Addigence nor its financial professionals have legal or disciplinary history. For a free and simple tool to research us further, visit Investor.gov/CRS.

Conversation Starters – Ask your financial professional:

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

5. ADDITIONAL INFORMATION

For more information about Addigence's services or to request up-to-date information, email us at admin@addigence.com or call our office at 212-321-0233. You may also find more resources at Investor.gov/CRS.

Conversation Starters – Ask your financial professional:

- 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?