Item 1: Firm Introduction

SocialTrader.ai Inc. is registered as an investment adviser with the United States Securities and Exchange Commission (SEC). We operate under the trade name SocialTrader. We provide investment advisory and non-advisory services through a digital platform. Fees for brokerage and investment advisory services differ, and it is important for you to understand these differences. You can use free and simple online tools to research firms and financial professionals by visiting **Investor.gov/CRS** and which also provides educational materials about broker/dealers, investment advisers, and investing.

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

We provide technology-enabled investment advisory services through a web-based and mobile platform. Our services are delivered through a digital platform. You choose the services you want, which may include:

- Access to model portfolios, tools, and investment insights
- Non-discretionary investment recommendations
- Automated or managed portfolio services (if selected)

The services you receive, including fees and authority, are described in your Service Election Record.

Not all services available on our platform are investment advisory services. An advisory relationship begins only when you select and activate a specific advisory service.

Monitoring Accounts

Where you elect advisory services, we may provide periodic reviews or system-generated monitoring depending on the services selected. The frequency and scope of monitoring depend on the services you select.

Investment Authority

We provide services on a non-discretionary basis by default. If you elect automated or managed services, we may be granted limited discretionary authority to implement trades or rebalance your portfolio.

Limited Investment Offerings

SocialTrader does not make available or offer advice with respect to proprietary products (we have none) or a limited selection of types of products (i.e., only recommending a money market account, etc.).

Account Minimums and Other Requirements

Certain services may have minimum investment requirements or eligibility criteria.

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?

Item 3: What fees will I pay?

Depending on the services you select, you may pay:

- A subscription fee for access to tools, research, and model portfolios
- An asset-based advisory fee for managed or automated services, billed monthly in arrears
- A performance-based fee for certain qualified client programs

You may also pay fees to third-party providers, including brokerage, custody, and transaction-related fees.

You will pay fees and costs whether you make or lose money. Fees will reduce your returns over time.

Conversation Starter:

- Help me understand how these fees and costs might affect my investments.

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 must act in your best interest. At the same time, the way we make money creates some conflicts with your interests.

For example, we may have an incentive to recommend certain services or providers, or to encourage you to maintain assets on our platform.

Conversation Starter:

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

How do your financial professionals make money?
Our firm makes money by charging an asset-based fee or performance-based fee on accounts under our management, as well as a subscription fees for access to tools, research, and model portfolios. Our services are primarily delivered through our digital platform, with support available from firm personnel as needed.

You access our services through our platform, with support available from firm personnel as needed.

Item 4: Do you or your financial professionals have legal or disciplinary history?
No, we have no disciplinary history. Visit **Investor.gov/CRS** for a free and simple search tool to research our firm. Our services are primarily delivered through our digital platform.

Item 5: Additional Information
Additional information about our services can be found in our Form ADV Part 2A firm brochure, which discloses the information in this customer relationship summary document and provides greater detail. If you would like additional, up-to-date information or a copy of this disclosure, please call our office at 209-732-8731 or access our **website:** www.socialtrader.ai