

Autonomous Wealth Management
Customer Relationship Summary (“CRS”)
Effective January 5, 2026

Introduction

Autonomous Wealth Management LLC (“AWM”) is registered with the Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand the difference.

AWM’s portfolio management process is driven by proprietary computer systems, including the use of artificial intelligence, that generate and manage portfolios matched to each customer’s investment profile. These systems consider factors such as market conditions, risk, return expectations, liquidity, tax considerations and customer-specific preferences. Customer accounts are monitored on an ongoing basis to help ensure consistency with the customer’s investment objectives, risk tolerance and constraints.

Free and simple tools are available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

AWM provides investment advisory services to retail customers. Customers may open taxable or individual retirement accounts (“IRAs”), with no account minimum. Our primary service includes managed investment portfolios composed of Exchange-Traded Funds (“ETFs”) and individual U.S. exchange-listed equities. Customers are placed in a portfolio which we believe to be in their best interest, based on their investor profile. Customer accounts are monitored on a regular basis in order to ensure customer accounts maintain their target portfolio allocation.

When opening a managed account with AWM, you grant us discretionary authority to make trades on your behalf, based on what we believe is in your best interest. A discretionary account allows us to buy and sell investments in your account, without asking you in advance. However, customers have the ability to modify recommendations made by AWM and are able to fine-tune their portfolio using AWM as a learning and analysis tool.

Additional services include research and analysis tools to inform the customer. Please refer to our Form ADV Part 2A Items 4 and 7 for more detailed information about our services.

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? We answer these questions [here](#).

What fees will I pay?

There is no platform fee for access to our digital advisory services. If you choose to use our Autonomous Index service (a direct-indexing program that builds a portfolio of individual stocks designed to track a specific ETF or mutual fund, with the potential for tax-loss harvesting and customization), we charge an annual advisory fee of 0.10%-0.75% on the assets in that portion of your account, depending on the strategy or features you select. This fee is billed monthly and applies only to the Autonomous Index assets, not your entire portfolio.

You will also pay other costs charged by your custodian or broker-dealer, such as wire transfer fees, and ACAT transfer fees. If you transfer assets to us by selling investments held elsewhere, you may incur taxes or charges (such as capital gains taxes or redemption fees) from that sale. Additionally, if your account holds ETFs, mutual funds, or other packaged products, you will bear the fees and expenses of those products (such as management fees, operating expenses, and any redemption or short-term trading fees), which are separate from the fees you pay to AWM.

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 information, please see Item 5 of our Form ADV Part 2A Brochure.

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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? We answer these questions [here](#).

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 is an example to help you understand what this means. Since we earn more when you place more assets into our Direct Indexing service, we have an incentive to encourage you to use that service.

We do not earn commissions for recommending investments, and we do not accept payments from product providers. Our only compensation comes from our Direct Indexing service, the 0.10% - 0.75% annual fee on those assets, if you choose this service. We believe transparency is key to trust. For more detail on how we address potential conflicts, please see Items 8, 10, and 11 of our Form ADV Part 2A Brochure.

Conversation starters: How might your conflicts of interest affect me, and how will you address them? We answer these questions [here](#).

How do your financial professionals make money?

AWM employees are paid salaries, discretionary bonuses and stock options. Discretionary bonuses are tied to individual performance, business unit performance and overall success of AWM. Compensation is not tied to the sale of specific securities, sales commissions, or investment recommendations.

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

No. Our firm and/or financial professionals do not have any legal and disciplinary history. Visit 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? We answer these questions [here](#).

Additional Information

We encourage you to seek out additional information about our investment advisory services and to request a copy of this relationship summary by contacting: support@atg.science. You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov. For additional questions or support, please email support@atg.science or call (914) 650-1988.

Conversation Starters: 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? We answer these questions [here](#).