

**GoldStandard Wealth Private Limited**  
**Effective May 7, 2026**  
**Form Customer Relationship Summary**

**I. Introduction**

GoldStandard Wealth Private Limited is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ, and that 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://Investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

**II. What investment services and advice can you provide me?**

GoldStandard Wealth provides three types of investment advisory services to retail clients through Separately Managed Accounts (“SMAs”):

- **Discretionary Portfolio Management.** If you select discretionary management, you grant us written authority to decide which securities to buy or sell, when to trade, the amount to trade, and which broker-dealer to use. Your approval of each transaction will not be sought out. Discretion is exercised only within your stated investment objectives, risk tolerance, and any reasonable restrictions you set.
- **Non-Discretionary Portfolio Management.** Under this service, we provide investment recommendations and ongoing monitoring of your portfolio. However, you make all final decisions. We will only execute trades after receiving your oral or written consent for each transaction. This may limit our ability to act quickly under certain market conditions.
- **Advisory-Only (No Execution, No Custody) Services.** We provide advice regarding your existing investment portfolio, including asset-allocation guidance and recommendations. You retain full responsibility for executing all trades through the broker or platform of your choice. We do not provide transaction execution, custodial services, or ongoing account supervision unless separately agreed in writing.

**Asset types we advise on:** equities; debt securities and fixed-income instruments; mutual funds and ETFs (including units of Indian-registered mutual funds); commodities, derivatives, and other listed securities.

**Monitoring.** We review discretionary and non-discretionary portfolios on an ongoing basis and at least annually. Advisory-only accounts are reviewed when you request advice or notify us of changes to your holdings.

**Minimum Account Size.** We generally require a minimum account value of INR 5,000,000 (approximately USD 58,000-60,000) for portfolio management services. Advisory-only services may be available without a minimum.

*For additional information, please see Items 4, 7, 8, and 13 of the Firm’s Form ADV Part 2A (the “Brochure”).*

**CONVERSATION STARTER:** *Ask your financial professional:*

- *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?*

**III. What fees will I pay?**

GoldStandard Wealth charges an annual investment management fee based on a percentage of the value of your assets under management. The fee is stated in your Investment Management Agreement and may be up to 2.5% per year, billed monthly or quarterly in arrears. For certain strategies, we may also charge a performance-based fee of up to 30% of investment gains, subject to regulatory requirements.

Some mutual funds or pooled investment vehicles that we recommend may charge their own fees, such as management fees, operating expenses, or exit loads, which are separate from the fees you pay us. If you redeem certain mutual fund units early, you may pay an exit load of up to 3%, which generally decreases over time according to the fund’s terms.

The more assets you have in an advisory account, the more you will pay in fees. This means we may have an incentive to encourage you to increase the assets in your account. Performance-based fees may also give us an incentive to take more risk in your account.

***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 additional information, please see Item 5 and 12 of the Firm’s Brochure.*

**CONVERSATION STARTER:** *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 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:

- *Performance-Based Fees.* For certain strategies, we may charge a performance-based fee. This may give us an incentive to take more risk in your portfolio or to favor accounts that pay performance fees when allocating investment opportunities.
- *Brokerage Practice.* We have the authority to select broker-dealers and determine commission rates for client transactions, subject to local regulatory limits. This creates a potential conflict because we could select brokers or commission levels that benefit us rather than you, although we seek best execution for all clients.
- *Mutual Fund Fees and Exit Loads.* If you invest in mutual funds, those funds charge their own internal fees and may impose exit loads. These costs reduce your returns and are separate from the advisory fees you pay us. We do not receive any portion of those fees, but the use of such funds may still create conflicts because we choose which funds to recommend.
- *Personal Trading.* We and our employees may buy or sell the same securities that we recommend to you. This creates a conflict because we could benefit from market movements ahead of your trades. We maintain policies designed to ensure that client trades receive priority over personal trades. When our interests conflict with yours, we are required to disclose the conflict and act in your best interest.

**CONVERSATION STARTER:** *Ask your financial professional:*

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

For additional information, please see the Item 11 and 12 of the Firm's Brochure.

### How do your financial professionals make money?

Our professional(s) is paid with a cash salary based on revenue we earn from our advisory services. Generally, compensation is related to the amount of client assets serviced.

### IV. Do you or your financial professionals have legal or disciplinary history?

No. Visit [Investor.gov/CRS](https://www.investor.gov/CRS) for a free and simple search tool to research GoldStandard Wealth Private Limited and its financial professionals.

**CONVERSATION STARTER:** *Ask your financial professional:*

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

### V. Additional Information

For additional information about our investment advisory services, please see the Firm's Brochure. If you would like additional, up-to-date information or a copy of this disclosure, please call +91-22-4336-7000 or email [compliance@thegoldstandard.in](mailto:compliance@thegoldstandard.in) to request up-to-date information and request a copy of Form CRS.

**CONVERSATION STARTER:** *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?*