

Coinedly LLC

Client Relationship Summary (Form CRS / Form ADV Part 3)

Date of this relationship summary: **6/23/2026**

Introduction

Coinedly LLC is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser. 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**, which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We offer investment advisory services to retail investors, with a focus on digital assets (cryptocurrencies and other digital assets) **and related securities/products concentrating on blockchain and alternative investments**. Our services include **ongoing portfolio management of digital-asset accounts, asset allocation and strategy, and related advice**.

- **Monitoring.** We provide ongoing monitoring, we monitor the investments in client accounts as part of our standard services on a regular basis.
- **Investment authority.** We manage accounts on a **discretionary basis — we buy and sell investments in your account without asking you in advance, subject to any limits you set. For a non-discretionary basis — you make the final investment decision.**
- **Limited investment offering.** Our advice is generally concentrated on digital assets **and a range of related products involving blockchain technologies**. We do not offer the full range of products some other firms provide.
- **Account minimums and requirements.** Our tiered fee schedule begins at \$1,000,000 in assets under management. **The minimum account size is \$1,000,000, and focuses on digital asset management for accredited, qualified,, private clients, multi-family offices, endowments, and additional institutional level enterprises.**

For additional information, see our Form ADV Part 2A brochure (Items 4 and 7),

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?

What fees will I pay?

You pay an ongoing **asset-based fee** calculated as a percentage of the assets we manage for you. The fee is **tiered**, with breakpoints at \$1M–\$5M, \$5M–\$10M, \$10M–\$20M, \$20M–\$50M, \$50M–\$100M, \$100M–\$250M, and \$250M+, so the rate depends on your account size. The first tier is set at 1.5%, 2nd tier, 1.25%, 3rd tier 1.0%, 4th tier .75% 5th tier .50%, 6th tier .25%. We bill **monthly, in advance**, based on your account value from the custodian's records as of the billing date, and we pro-rate for partial periods and mid-period contributions or withdrawals. **A minimum annual administration fee of .20% applies to all clients. We deduct fees directly from your account.**

Because our fee is based on the amount of assets in your account, **the more assets you have in your account, the more you will pay us**, so we have an incentive to encourage you to increase the assets in your account.

You will also pay **other fees and costs charged by third parties**, such as custodian or wallet-provider fees, network/transaction ("gas") fees, exchange or trading fees, and any product-level fees. These are separate from and in addition to our advisory fee.

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, see Form ADV Part 2A (Item 5)

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.

- Our firm and our employees may hold, trade, or receive allocations, airdrops, or staking rewards in the same digital assets we advise you on, which can create an incentive to favor those assets.
- We may have relationships with protocols, validators, or digital-asset exchanges/platforms that can create incentives affecting our advice.
- When limited opportunities (such as token launches or limited offerings) are available, we decide how to allocate them among clients and any proprietary accounts.

For additional information, see Form ADV Part 2A

Conversation Starter. Ask your financial professional —

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

How do your financial professionals make money?

The financial professionals, fund administrators, blockchain developers, and wealth analysts are paid a base salary and/or a share of the advisory fees from the accounts they service, plus discretionary bonuses based on assets under management or new client relationships — and the conflict this creates (an incentive to increase the assets you place with us or to encourage you to remain a client).

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 us and our financial professionals.

Conversation Starter. Ask your financial professional —

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

Additional Information

For additional information about our investment advisory services, or to request an up-to-date copy of this relationship summary, see www.coinedly.com/ for further information or email us contact@coinedly.com

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?