

MyWallSt Advisory, LLC Form CRS

June 14, 2021

MyWallSt Advisory, LLC (“the Firm” or “we”) is registered with the 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](https://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?

The Firm offers non-discretionary investment advisory services through our mobile platform by conducting regular retroactive quarterly reviews of your account. Because we have no discretionary authority over your account(s), you make the ultimate decision regarding the purchase or sale of investments. The program is limited to individual retail investors and to those who use our Advisory App.

Account Monitoring:

Our investment advisor representatives will review the self-directed trading activity in your account and compare to your investor profile to provide retroactive advice on the consistency of trading in the account with your stated objectives on a quarterly basis. The accuracy of your risk profile selection will affect the review accuracy. If your risk profile changes, you need to update your risk profile by contacting hello@mywallstadvisory.com.

Account Minimums: Our advisory program has a one dollar minimum account size requirement.

Limited Investment Offerings:

The securities available are a limited universe of publicly-traded stocks and exchange traded funds (“ETFs”), which is subject to change, as determined by the fully disclosed clearing firm. All users have access to the same universe of securities. We categorize the securities that are available for purchase in the program as being Conservative, Moderate, or Aggressive.

While we do not accept custody of client assets, we work with qualified custodians. For additional information, please see our [MyWallSt Advisory ADV2A Brochure](#).

Conversation Starters:

- *Given my financial situation, should I choose to work with an investment adviser? 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?

In an investment advisory account, you will incur advisory fees which are generally assessed monthly at the rate you authorized in your agreement (based on our published fee schedule).

The asset-based fees are based on a percentage of the value of the assets in your account at month-end. The Firm charges monthly, in arrears.

The issuers of some of the securities you purchase will charge ongoing internal product fees that affect your account performance. Depending on the activities or services, the clearing firm and custodian also charge you other fees (transaction fees, account transfer, physical trade confirm, etc.)

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.

	<p>For additional information about our firm’s fees, as well as other fees are included in our MyWallSt Advisory ADV2A Brochure.</p> <p>Conversation Starters: <i>-Help me understand how these fees and costs might affect my investments.</i> <i>- If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?</i></p>
<p>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?”</p>	<p>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.</p> <ul style="list-style-type: none"> • <i>Because the Firm is compensated based on the amount of assets in your account, we are incentivized to increase your assets.</i> The more assets you hold in your Account, the higher your program fee will be. You pay our advisory fee even if you do not buy or sell any securities and whether you make or lose money on your investments. • Although we believe our fees are competitive, lower fees for comparable services may be available from other investment advisers or broker dealers. Fees and costs will reduce any amount of money you make on your investments over time. • Our parent company offers separate publishing service subscriptions. If you obtain a MyWallSt publishing subscription, our parent receives subscription fees, which may be similar to, or more expensive than subscriptions offered by publishers not affiliated with us. The Firm has an indirect financial interest in clients subscribing to our parent company’s publishing services. However, you are under no obligation, contractually or otherwise, to purchase <p>Conversation Starters: <i>How might your conflicts of interest affect me, and how will you address them?</i></p> <p>For additional information, please see MyWallSt Advisory ADV 2A Brochure.</p>
<p>How do your financial professionals make money</p>	<p>Investment professionals are generally compensated both in the form of a fixed monthly fee from the Firm, as well as a discretionary annual bonus based on criteria such as merit, employee performance and performance of the Firm. Investment professionals employed by the Firm are not compensated on a transaction basis.</p>
<p>Do you or your financial professionals have legal or disciplinary history?</p>	<p>No. Please visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter: <i>As a financial professional, do you have any disciplinary history? For what type of conduct?</i></p>
<p>Additional Information</p>	<p>For additional information about our services or to request a copy of this disclosure, visit our website at www.mywallstadvisory.com or email hello@mywallstadvisory.com.</p> <p>Ask us the following questions:</p> <ul style="list-style-type: none"> • <i>Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer?</i> • <i>Who can I talk to if I have concerns about how this person is treating me and my investments?</i>