

# Streetbeat LLC

## Form CRS Conversation Starters

Updated March 20, 2024

*This document is a supplement to our CRS - [Customer Relationship Summary](#). Please see that form for additional details about our services.*

### **About Form CRS**

Form CRS (which stands for client relationship summary) is a uniform disclosure document prepared by broker-dealers and investment advisers registered with the Securities and Exchange Commission ("SEC"). Streetbeat LLC ("Streetbeat") is registered with the SEC as an investment adviser. Investment advisers and broker-dealers are required to deliver to retail investors a brief relationship summary written in plain English that provides information about the firm's relationships and services, fees, costs, conflicts of interest, standard of conduct, disciplinary history, and where to find additional information. The relationship summary also includes key questions ("conversation starters") for investors that Streetbeat has answered below. The relationship summary is in addition to the Form ADV Part 2 narrative brochure that investment advisers provide to their clients. You can contact our [support@streetbeat.com](mailto:support@streetbeat.com) if you have any further questions.

Learn more: [Investor.gov/CRS](https://investor.gov/CRS)

### **Given my financial situation, should I choose an investment advisory service? Why or why not?**

You should only choose an investment advisory service if you're ready to start investing in the first place. Streetbeat is an investment advisory service for people who prefer to invest via apps and technology. Streetbeat does not provide investment advice in person or over the phone or in any manner other than through the Website and App. If you require more comprehensive advisory services, many options exist. You should consider your individual needs in deciding whether to hire an investment adviser and select the appropriate service.

### **How will you choose investments to recommend to me?**

Streetbeat recommends investments based on the model strategy and on the information provided in the Suitability Questionnaire you complete at onboarding. Artificial Intelligence (AI) is used in conjunction with our proprietary algorithmic models along with your answers to the suitability questionnaire to identify recommended strategies.

## **What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?**

The advisory services offered through Streetbeat are provided by Streetbeat LLC, a registered investment adviser registered with the United States Securities and Exchange Commission (SEC). Registration as an investment adviser does not imply any level of skill or training. We do not provide personalized or individualized advice. We are considered a “robo-adviser” as our services are provided solely through a platform that includes a website and mobile app.

## **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?**

The cost of our services is subscription-based and currently is priced at \$19.99 per month when billed monthly and \$159 per year (\$13.25 per month) when billed annually. Our monthly and annual fees may change, for the most recent pricing, please refer to our [Fee Schedule](#).

You do not pay fees on a per-transaction basis. Third-party fees from certain types of investments (like ETFs) are embedded in the investments that are purchased for your account.

There are additional fees and costs that may be applied to your account. A full list of fees and costs that may apply to you and your account can be found in our [Fee Schedule](#) and [Form ADV Part 2A](#).

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

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.

- We make money by having more customers using our Platform so we have an incentive to sign-up additional customers to the service.
- Our employees may personally hold interests in the same securities the Model recommends to our clients. Employee trading is continually monitored under the Code of Ethics, and to reasonably prevent conflicts of interest between Streetbeat and its Clients.

These conflicts are mitigated by our policies and procedures, as well as the automated nature of the Model.

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

Neither Streetbeat LLC nor any of its associated persons have any disciplinary events relating to investment advisory activities.

**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?**

As a robo-adviser, our services are provided solely through the website and mobile application. We do not provide individualized or personalized investment advice. However, if you have any questions regarding your account or if you require technical support, please contact us at [support@streetbeat.com](mailto:support@streetbeat.com).