

Leslie Global Wealth, LLC
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FORM CRS

Leslie Global Wealth, LLC is registered with the Securities and Exchange Commission as an investment adviser and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ and it is important for you, our client, to understand the differences. Additionally, 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. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors: **Portfolio Management Services; Financial Planning Services; and Selection of Other Advisers**. Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, 13 and 16 by clicking this link <https://adviserinfo.sec.gov/firm/brochure/128202>.

Account Monitoring If you open an investment account with our firm, as part of our standard service we will monitor your investments on a daily basis.

Investment Authority We manage investment accounts on a **discretionary** basis whereby **we will decide** which investments to buy or sell for your account. You may limit our discretionary authority (for example, limiting the types of securities that can be bought or sold for your account) by providing us with your restrictions and guidelines in writing. We also offer **non-discretionary** investment management services whereby we will provide advice, but **you ultimately decide** which investments to buy and sell. You have an unrestricted right to decline to implement any advice we provide on a non-discretionary basis. We have discretion to select, retain or replace third-party managers to manage your accounts.

Investment Offerings We provide advice on various types of investments. Our services are not limited to a specific type of investment or product.

Account Minimums and Requirements In general, we require a minimum account size to open and maintain an advisory account, which may be waived in our discretion.

Key Questions to 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?

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services. For detailed information, refer to our Form ADV Part 2A Brochure by clicking this link <https://adviserinfo.sec.gov/firm/brochure/128202>.

- **Asset Based Fees** - Payable quarterly in advance. Since the fees we receive are asset-based (i.e. based on the value of your account), we have an incentive to increase your account value which creates a conflict especially for those accounts holding illiquid or hard-to-value assets;
- **Hourly Fees** - We require that you pay 50% of the fee in advance and the remaining portion upon the completion of the services rendered. At our discretion we may waive this deposit.
- **Fixed Fees** - Payable as invoiced;
- Some of our Financial Professionals are registered representatives of LPL Financial LLC ("LPL"), an SEC registered broker-dealer and investment adviser. Your Financial Professional may offer you brokerage services through LPL or investment advisory services through Leslie Global Wealth, LLC. Brokerage services and investment advisory services are different, and the fees we, and LPL, charge for those services are different. It is important that you understand the differences. In particular, your Financial Professional may earn additional transaction-based compensation and have additional conflicts of interest as a result of providing brokerage

services through LPL. You are encouraged to learn more about LPL by reviewing LPL's relationship summary and having a discussion with your Financial Professional. You can also access free and simple tools to help you 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.

- You may pay other costs and expenses. Examples of common fees and costs applicable to our clients are: custodian fees; account maintenance fees; fees related to mutual funds and exchange-traded funds; transaction charges when buying or selling securities; and other product-level fees associated with your investments

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.

Key Questions to 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.

- *Third-Party Payments*: See the section above titled "What fees will I pay?" for more information. .

Refer to our Form ADV Part 2A Brochure by clicking this link <https://adviserinfo.sec.gov/firm/brochure/128202> to help you understand what conflicts exist.

Key Questions to 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?

Our Company and the financial professional servicing your account(s) are compensated by receiving a salary and bonus. Neither our Company nor our financial professionals receive commissions for advisory services. As noted above, however, Financial professionals that are also registered representatives of LPL Financial LLC may receive commissions when acting in that capacity. Financial professionals' compensation is based on the revenue the firm earns from the person's services or recommendations.

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

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. Visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple research tool.

Key Questions to Ask Your Financial Professional

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at 312-946-1000 or click the link provided <https://adviserinfo.sec.gov/firm/brochure/128202>.

Key Questions to 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?**