



Madison Global Partners, LLC

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## RELATIONSHIP SUMMARY

June 30, 2020

Dear Client:

There are different ways you can get help with your investments. You should carefully consider which types of accounts and services are right for you. As you know, the financial professional (FP) who services your retail account is employed by Madison Global Advisors (MGA), an Investment Advisor registered with the U.S. Securities and Exchange Commission (SEC) and the New York State Attorneys General Office. MGA is also a member of the Securities Investor Protection Corporation.

MGA is a registered investment advisor. Brokerage and investment advisory services and fees differ and it is important that retail investors understand the differences.

The SEC has mandated that brokerage firms and investment advisory firms provide retail clients with a "Relationship Summary" that outlines the services provided, costs involved and other information about the firm and its FPs.

This letter serves as our Relationship Summary to you.

For your information, free and simple tools are available to research brokerage and investment advisory firms and their financial professionals at [Investor.gov/CRS](http://Investor.gov/CRS), which also provides educational materials about those firms and investing.

### ***What services do we offer our retail clients?***

MGA provides Investment Advisory services on a solicited basis. A solicited order is one that is recommended by your FP and executed with your prior review and approval. Orders can be executed for listed and unlisted stocks and bonds, options, mutual funds and unit investment trusts. We do not offer proprietary products. There is a minimum account size of \$25,000 dollars.

Most orders are executed on an agency basis wherein MGA acts as an agent in executing your order, although some orders can be executed on a principle basis where MGP is on the other side of the trade.

You receive a trade confirmation for each order executed disclosing all trade facts. You also receive monthly statements of account activity unless there is no activity, in which case you receive quarterly statements.

Confirms and statements should be reviewed carefully for accuracy. Questions about your account should be discussed with your FP, a supervisor or the Compliance Department. Call 646-690-0330 to speak to a supervisor or Compliance or mail a letter to 350 Motor Parkway, Suite 205, Hauppauge, NY 11788 or fax one to 631-521-7343.

Client transactions are reviewed daily by your FP's supervisor and Compliance.

### ***Is a fee based account right for you?***

Have a conversation with your FP about the services provided and whether an investment advisory relationship is correct for you. You may want to ask: "*Given my financial situation, should I choose an advisory-fee based account? Why and why not?*"

***What fees will you pay?***

You pay an advisory fee based on the amount of assets in your account. That fee is expressed as a percentage of your assets. You do not pay a commission per trade, the fee covers all costs. The amount of transactions executed in your account does not affect the fee that you pay. Fees are deducted from your account quarterly. While each advisory account is actively managed on a continuing basis, market conditions may dictate periods where no activity will occur in the account.

Make sure you understand what fees and costs you are paying. Have a discussion with your FP regarding all costs and fees associated with your account. You might want to ask: "*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 our legal obligations to you when making recommendations?***

MGA and your FP have legal obligations when making recommendations to you. We must act in your best interest and not put our interests ahead of yours. Any conflicts of interest must be disclosed to you, such as if we were to recommend a proprietary product, make a trade on a principal basis, receive a third party payment on transactions in your account, receive payment for order flow or share revenue received from you.

*Ask your FP if there are any conflicts with respect to the recommendations, how they affect you and how they will be addressed. Also ask how he or she selects those investments and about his or her relevant experience, including licenses, education and other qualifications and what those qualifications mean.*

***How does your FP make money?***

The answer is that he or she gets paid a portion of the fee deducted from your account. Your FP's compensation is not affected by how many transactions you do.

***Does MGA or its FPs have legal or disciplinary history?***

Several FPs have currently reportable events on their registration record. Go to [Investor.gov/CRS](http://Investor.gov/CRS) for information on these matters. *Also ask your FP if he or she has any reportable events and the nature of them.*

***Additional Information***

For more information about MGA, visit our website at [madisonglobalpartners.com](http://madisonglobalpartners.com). Also call 646-690-0330 for up-to-date information or to request copies of the current Relationship Summary.

*Ask your FP for other MGA contacts and who else you could speak to if you have questions or issues about the service being provided.*