

DOMAIN MONEY ADVISORS, LLC: Client Relationship Summary – Form CRS – November 5, 2021

Item 1 – Introduction

Domain Money Advisors, LLC (“**Domain**”, “**our**” or “**we**”) is an investment adviser registering with the Securities and Exchange Commission (the “**SEC**”). Brokerage and investment advisory services and fees differ, and it is important that you understand the differences. The SEC provides free educational materials about investment advisers, brokerage services, and investing and offers simple tools to help you research firms and financial professionals at www.investor.gov/CRS.

Item 2 – Relationships and Services

What investment services and advice can you provide me?

Domain will provide discretionary, web-based, portfolio management services with respect to separately managed accounts (each an “**Account**”, and collectively, “**Accounts**”) of retail investors and other clients (each a “**Client**”, and collectively, “**Clients**”).

Subject to the terms and conditions set forth in the applicable Account documents of each Client, which include an Advisory Agreement and certain third-party documents related to the Client’s account(s) (collectively, “**Account Documents**”), Domain expects to provide or make available to Clients, via a web-based (the “**Domain Website**”) and mobile application (the “**Domain App**”), various investment portfolios based on Domain’s proprietary equity and cryptocurrency strategies (collectively, the “**Domain Strategies**”).

The Domain Strategies will be actively monitored by Domain and may be rebalanced from time to time in the discretion of Domain, which may be influenced by algorithmic triggers and other factors.

Subject to the applicable Account Documents and a Client’s selection of one or more Domain Strategies, we generally will have discretionary power and authority over the types of investments to be bought and sold, as well as the amount to be bought and sold, on behalf of each of our Accounts consistent with the Domain Strategy(ies) selected by each Client. In addition, we generally will have the authority to select, retain and engage the service providers, counterparties and vendors to perform and provide services with respect to each Account, and the negotiation of fees, commissions and compensation to be paid or payable to such persons by Accounts.

Domain requires that its Clients use Apex Clearing Corporation (“**Apex**”) as the independent custodian of their securities, and for securities clearing and execution services. If Clients elect to invest in crypto assets, then Domain also requires that its Clients use Gemini Trust Company, LLC (“**Gemini**”) for the purchase and sale of supported crypto assets as well as recordkeeping and reporting services. As part of the Account opening process, each Client will need to provide personal information about themselves, including financial information and investment goals and objectives. Domain will utilize this information to recommend the Domain Strategy (or Domain Strategies) appropriate for the Client. The Domain Strategy recommendation created by Domain for each Client will be based solely upon the information provided by the Client through the questionnaire. Domain will not tailor the Domain Strategies to each Client. Domain will not make recommendations as to Client allocations across Domain Strategies. The suitability of the Domain Strategies recommendation is limited by the number and type of Domain Strategies made available by Domain. The suitability of the Domain Strategies recommendation is also limited by and relies upon the accuracy and completeness of the information provided by the Client. A Domain Strategy is not intended to be diversified and is not suitable for all investors. Clients must invest a minimum of \$100.

While not part of its advice and advisory business, as an accommodation to Clients, Domain may permit Clients to make their own investment decisions and direct their own trades through the Domain Website or Domain App (“**Self-Directed Trading**”). In such cases, Domain will not be providing investment advice, any recommendations or advisory services and is therefore not acting as an investment adviser with respect to such trading. Such Clients will be solely responsible for any Self-Directed Trading. Clients who are no longer invested in at least one Domain Strategy will not be permitted to engage in Self-Directed Trading.

For more information, please see Domain’s Form ADV Part 2A (“**Brochure**”), which is available on the Domain Website and on the SEC’s IAPD database at www.adviserinfo.sec.gov.

Conversation Starters

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

How will you choose investments to recommend me?

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

Item 3 – Fees, Costs, Conflicts, and Standard or Conduct

What fees will I pay?

In consideration of our investment advisory and portfolio management services, Domain will charge Accounts a one percent (1%) per annum management fee (the “**Management Fee**”). The Management Fee will be charged monthly in arrears and prorated for any period other than a complete calendar month. The Management Fee will be calculated based on the daily average market values of an Account’s portfolio over the month prior to the Management Fee being assessed.

Domain’s Management Fee is in addition to transaction expenses and other amounts charged by brokers and other service providers. Clients should carefully review the applicable Account Documents for a description and details regarding the fees and expenses associated with the services offered by brokers and other service providers, as well as Domain.

Domain’s equity investment strategies generally are expected to involve the purchase or sale of publicly offered securities, and as such, typically will entail expenses related to brokerage commissions. In addition, each Client generally will be responsible for and will bear any Account custodial fees and expenses.

Due to the nature of the Management Fee, the more assets there are in a Client’s Account, the more a Client will pay in fees. Domain therefore has an incentive to encourage Clients to increase the assets in their Account(s) and to invest in more than one Domain Strategy if appropriate.

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 more information regarding our fees, see Domain’s Brochure.*

Conversation Starters

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. An example to help you understand what this means includes that the way we make money (the Management Fee) is not tied to the overall performance of your Domain Account. For more information regarding our conflicts of interest, see our Brochure.

Conversation Starters

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

How do your financial professionals make money?

Domain’s financial professionals receive a standard base compensation and discretionary bonus. Total compensation takes into account factors in our discretion such as market rate for the role and expertise, overall revenue, new assets, retained assets, contributions to our culture, and business strength. Our financial professionals will have accounts at our firm but may also invest in other accounts or opportunities outside our firm. Our financial professionals’ compensation incentives, demand on their time, and personal investing activities may raise conflicts with your investment needs and the services we provide.

Item 4 – Disciplinary History

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

No. Visit www.investor.gov/CRS for a free and simple search tool to research us further.

Conversation Starters

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

Item 5 – Additional Information

For more information about our investment advisory services, please see Domain’s Brochure. You can also request additional, up-to-date information or a copy of this Relationship Summary by calling us at (646) 970-6926.

Conversation Starters

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?