



**SVVY, LLC**  
*a Registered Investment Adviser*

4417 N. 40th St, Ste. 300C Phoenix, AZ 85018  
623-400-7296  
www.besvvy.com

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### **Form ADV Part 3**

We are registered with the SEC as an investment adviser. Brokerage and investment advisory services fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at <http://investor.gov/crs>, which also provides educational materials about broker-dealers, investment advisers, and investing.

#### **Relationships and Services**

##### **What investment services and advice can you provide me?**

Our firm offers matchmaking services to individuals and high-net-worth individuals (“Users”) and referral services to companies through our online matching platform, which matches Users, using an online questionnaire, to other registered investment advisers (RIAs) and licensed experts such as insurance agents, realtors, and lawyers. Our services are fully described in our Form ADV Part 2A (“Disclosure Brochure”). We do not manage assets, and we do not exercise any investment authority. Therefore, we do not monitor or review investment accounts. Our services are limited to making referrals to other RIAs, IARs, and other licensed experts through our matching platform. There is no fee or minimum level of wealth required to use our platform.

Additional information about our services can be found in Items 4, 5 and 7 of our Disclosure Brochure and is available to all clients or by going here: <https://adviserinfo.sec.gov/>

*Let’s discuss...* 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?

#### **Feeds, Costs, and Standards of Conduct**

##### **What fees will I pay?**

You will not pay any direct fee to Svvy for being a User on our platform. However, if you work with a third-party advisor/expert, you will pay fees to that Advisor/expert based on the services the Advisor/expert provides to you and the terms and conditions of any agreements between you and the Advisor/expert. Svvy collects a subscription fee from advisors/experts who have elected to receive referrals from Svvy. Svvy receives this subscription compensation from experts/advisors regardless of the User selecting/using the advisor/expert’s services. Svvy fees are fully described in our Disclosure Brochure.

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. As explained above, you will not pay any fees to us, but you will pay a fee to the RIA that you choose to provide you with investment advice. Please make sure you understand what fees and costs you are paying.

Additional information about our fees can be found in Item 5 of our Disclosure Brochure and is available to all clients or by going here: <https://adviserinfo.sec.gov/>

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**Let's discuss...** Help me understand how these fees and costs might affect my investments. If I give an RIA \$200,000 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 are obligated 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. The following is an example to help you understand what this means:

- Svvy is under common control with 17 Capital Partners, LLC (CRD # 283013), which is an SEC-registered investment advisor. 17 Capital Partners does provide investment advice to individuals and charges a fee based on a client's percentage of the assets under management with 17 Capital Partners. Therefore, Svvy has a conflict of interest as we have an incentive to direct Users to 17 Capital Partners in order to increase the amount of assets under management with 17 Capital Partners.

**Let's discuss...** How might your conflicts of interest affect me, and how will you address them?

Additional information about our conflicts of interest can be found throughout our Disclosure Brochure and available to all clients or by going here: <https://adviserinfo.sec.gov/>

**How do your financial professionals make money?**

Our financial professionals are compensated on a salary basis.

Additional information about our financial professionals can be found on their respective Form ADV Part 2 Brochure Supplements that you will be provided.

**Do you or your financial professionals have a legal or disciplinary history? For what type of conduct?**

No, neither we nor our financial professionals have a legal or disciplinary history. You can visit <http://investor.gov/crs> for a free and simple search tool to research us and our financial professionals.

**Let's discuss...** As a financial professional, do you have any disciplinary history? For what type of conduct?

### **Additional Information**

To obtain additional information regarding our services or to request a copy of this relationship summary, please contact Jenna at

**Let's discuss...** 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?

Our Firm and its representatives have a fiduciary duty to all clients. Please call us at 602-446-6394 if you have any concerns.