Autonomous

Autonomous Wealth Management LLC Effective July 20, 2026
Customer Relationship Summary (Form CRS)

Autonomous Wealth Management LLC ("Autonomous") is registered with the Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand the difference.

Free and simple tools are available to research firms and financial professionals at investor.gov/CRS which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We provide retail investors with portfolio construction recommendations delivered through our digital platform on our website. Our service includes:

- A digital onboarding process where you provide information about your financial circumstances, investment objectives, risk tolerance, time horizon, liquidity needs, and other suitability information (your "Investor Profile").
- An AI-driven personalized portfolio, built from your Investor Profile and implemented in your brokerage account at Apex Clearing Corporation ("Apex").
- Deterministic (rule-based) suitability and compliance checks designed to align the recommendation with your stated profile.
- The ability to request a portfolio revision at any time, including after you update your Investor Profile; when you do, our systems generate a revised portfolio and we execute the changes in your account. We do not automatically monitor, rebalance, or tax-loss harvest your portfolio at this time.

Our portfolio process is driven by proprietary computer systems, including artificial intelligence, that construct portfolios matched to each client's investment profile, considering factors such as market conditions, risk, return expectations, liquidity, taxes and client-specific preferences. We do not monitor your portfolio on an ongoing basis; we revise it when you request an update. If your circumstances or objectives change, update your Investor Profile and request a revision.

You grant us discretionary authority through your investment management agreement: when we implement your initial portfolio or a revision you request, we decide which securities to buy and sell in your account, consistent with your Investor Profile and any reasonable restrictions you impose. Our services are provided solely through our website and app. There is no minimum account size. Access is currently by invitation and we expect to remain invitation-only for the foreseeable future.

> ***Conversation starters: 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?*** **We answer these questions here.**

What fees will I pay?

We do not currently charge advisory fees; our services are provided at no charge during our beta period. We plan to begin charging advisory fees after our beta program concludes. You will receive at least 30 days' notice and updated disclosures before any fee begins.

We pay the transaction and recurring account charges that Apex assesses on your account; you do not pay separate commissions. You pay certain other costs, such as regulatory transaction fees on sales, wire and account-transfer fees, paper statement fees, and margin interest. Selling investments held elsewhere to transfer assets to us may trigger taxes or charges. If your account holds ETFs or other products, you bear those products' fees and expenses, which we do not control and do not receive.

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, please see our Part 2A of Form ADV, Item 5.

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? **We answer these questions here.**

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 interests 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:

- Our service is currently free during our beta period, and we plan to begin charging fees after the beta program concludes. You may feel committed to continue using our service because we built and manage your portfolio, even if a different adviser or approach would better serve your needs. You are never required to remain a client and may end our relationship at any time without penalty.
- We pay the per-trade and recurring charges our custodian assesses on your account, which gives us an incentive to trade your account less frequently. Once we begin charging asset-based fees, we will also have an incentive to increase the assets you place under our management.

Conversation starters: How might your conflicts of interest affect me, and how will you address them? **We answer these questions here.**

For more details on how we address potential conflicts, please see Part 2A of Form ADV.

How do your financial professionals make money?

Autonomous employees are paid salaries, discretionary bonuses and stock options. Discretionary bonuses are tied to individual performance, business unit performance and overall success of Autonomous. Compensation is not tied to the sale of specific securities, sales commissions, or investment recommendations.

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

No. Visit investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Conversation starters: As a financial professional, do you have any disciplinary history? For what type of conduct? **We answer these questions here.**

We encourage you to seek out additional information about our investment advisory services and to request a copy of this relationship summary by contacting: support@atg.science. You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov. For additional questions or support, please email support@atg.science or call (914) 650-1988.

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? **We answer these questions here.**

Exhibit A – Material Changes to Form CRS

Autonomous Wealth Management LLC ("Autonomous") client relationship summary (Form CRS) was amended July 20, 2026, to reflect changes in the services Autonomous is currently providing. The most significant changes include:

- **Change in Service Model:** Autonomous now provides discretionary investment management through its digital platform. We construct a personalized portfolio based on your Investor Profile and implement it in your brokerage account at Apex Clearing Corporation. Previously, clients received portfolio recommendations only and implemented them on their own.
- **Discretionary Authority:** Clients now grant Autonomous discretionary authority through an investment management agreement, exercised when we implement the initial portfolio and when we execute portfolio revisions a client requests.
- **Client-Initiated Revisions**: You may request a portfolio revision at any time, including after updating your Investor Profile, and we will revise your portfolio and execute the changes in your account.
- **Access and Fees:** Access is currently by invitation, and we expect to remain invitation-only for the foreseeable future. Our services remain free of charge during our beta period; we plan to begin charging advisory fees after the beta program concludes, with at least 30 days' notice and updated disclosures first. We now pay the transaction and recurring account charges that Apex assesses on client accounts.
- **Updated Conflicts of Interest Disclosure:** We updated our conflicts disclosure to reflect the current service model, including the planned introduction of fees and our payment of per-trade custodial charges.
- In addition, we made various conforming and clarifying edits throughout the document to reflect these changes.