

Udon RIA Sub, LLC

Customer Relationship Summary*

Udon RIA Sub, LLC is registered with the United States Securities and Exchange Commission (the “SEC”) as an investment adviser and does business under the name “Follow RIA”.

Brokerage and investment advisory services and fees differ. It is important that you understand the difference.

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

What investment services and advice can you provide me?

Follow RIA provides investment advisory services to retail investors via an app available through the Apple App Store and Google Play. These services include establishing a securities portfolio for clients that is derived from the portfolio of a “Leader” (individuals who regularly create and publish investment-related commentary to their subscribers), maintaining a “Proxy Account” in the manner of clients’ Leader-derived portfolios to provide clients with information relevant to their investment decisions, providing clients with a classification of their investment profile, and providing a risk “score” for such Leader-derived portfolios.

Follow RIA does not monitor retail investors’ investments. Follow RIA requires a minimum \$5 initial investment for each Leader-derived portfolio that you open.

Investment options are limited to certain stocks and ETFs listed on U.S. securities exchanges.

If you decide to invest through Follow RIA, you will be required to provide advanced, written authority to Follow RIA to enter orders on your behalf. This authority will allow Follow RIA to exercise limited discretion on your behalf, and will allow Follow RIA to enter orders to buy or sell investments in your account consistent with your prior consent to establish and maintain a portfolio that is derived from a certain Leader’s portfolio that you selected. You will also have to agree to the separate terms and conditions of the broker-dealer that Follow RIA has chosen to hold your brokerage account and effect trades on your behalf.

Additional information regarding Follow RIA’s services can be found by accessing Follow RIA’s Form ADV Part 2A (brochure) (specifically items 4 and 7 and items 4.A and 5 of Appendix 1 thereof). Follow RIA’s current brochure is available [here](https://adviserinfo.sec.gov/). <https://adviserinfo.sec.gov/>

Here are some questions you might want to ask a financial professional to start a conversation about relationships and services:

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?

Retail investors must agree to subscribe to investment content made available electronically by an affiliate of Follow RIA. Follow RIA’s affiliate will charge a monthly subscription fee for this access, which will vary depending upon the content accessed. Follow RIA may charge an annual advisory fee of .25% of net assets under management for its advisory services on a pro rata basis of .02083% per month in arrears. The broker-dealer that Follow RIA has chosen to hold your brokerage account and effect trades on your behalf will not charge commissions on trades. The broker-dealer may, however, charge additional fees for other services as, from time-to-time, may be set forth on the broker-dealer’s fee schedule.

* Certain statements in this summary are required by SEC Form CRS, summary in nature and limited in substance and size by SEC Form CRS and do not create or modify any agreement, relationship, or obligation between you and Follow RIA. All statements herein are subject to the more complete terms and conditions of our investment advisory agreements and disclosures (including Form ADV Part 2), which is available [here](https://adviserinfo.sec.gov/). <https://adviserinfo.sec.gov/>.

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.

Additional information regarding fees and costs can be found by accessing the Follow RIA Form ADV Part 2A brochure (specifically Items 5.A., B., C., and D.) (<https://adviserinfo.sec.gov/>).

Here are some questions you might want to ask a financial professional to start a conversation about fees:

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 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 with your interests because they can affect the choices you make. Here is an example to help you understand what that means.

- Follow RIA may make money when you decide to subscribe to investment content. Therefore, it is in Follow RIA's interest to present you with publishers of investment content (i.e., "Leaders") that are likely to cause you to subscribe to their content, rather than to identify Leaders who are likely to be successful investors, which may or may not be the same individuals.

Here are some questions you might want to ask a financial advisor to start a conversation about conflicts of interest:

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

Additional information regarding conflicts of interest can be found by accessing the Follow RIA Form ADV Part 2A brochure (<https://adviserinfo.sec.gov/>).

How do your financial professionals make money?

Follow RIA's employees are salaried employees who may qualify for incentive compensation, which is discretionary and based upon a wide range of factors.

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 and our financial professionals.

Here are some questions you might want to ask us to start a conversation about legal or disciplinary history:

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

Additional Information

You can request additional information about our investment advisory services and request a copy of Form CRS by writing or calling Follow RIA at the address or telephone number set forth below:

**Follow RIA
Building C, 1 Letterman Drive c3500,
San Francisco, CA 94129
(707) 563-1896**

Here are some questions you might want to ask us to start a conversation about the contacts and complaints:

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.