

Form CRS - Matthew Martin, Investment Adviser

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Matthew Martin, Investment Adviser is an SEC-registered investment adviser. Registration does not imply any level of skill or training. Brokerage and investment advisory services and fees differ, and it is important to understand the differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS. The site also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

Matthew Martin, Investment Adviser offers investment advisory services to retail investors through our interactive website and comprehensive software model. We only offer recommendations and do not have custody or discretion over client accounts. That means that you, the investor, have full discretion and authority to purchase or sell any investments recommended. We do not offer financial planning or wrap fee programs, and we do not monitor client accounts. We only offer advice with respect to stocks, bonds, and options. We do not have any minimums for opening or maintaining an account.

For more detailed information, view our brochure on our website at <https://matthewmartin.tech>.

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

Visit <https://matthewmartin.tech> and view our "Conversation Starters" document for answers.

How will you choose investments to recommend to me?

Visit <https://matthewmartin.tech> and view our "Conversation Starters" document for answers.

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

Visit <https://matthewmartin.tech> and view our "Conversation Starters" document for answers.

What fees will I pay?

We have no asset-based or wrap fee program fees, and we do not receive any compensation in connection with the sale or purchase of securities. The only fee we charge is a one-time, \$450.00 fixed fee to access our comprehensive software model through our interactive website. This one-time fee allows you to access our software model once and the advice provided is not updated beyond the initial use. We do not charge any other fees or costs, such as custodian fees, account maintenance fees, fees related to mutual funds and variable annuities, and other transactional fees and product-level fees. 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 detailed information about our fees, view our brochure on our website at <https://matthewmartin.tech>.

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?

Visit <https://matthewmartin.tech> and view our "Conversation Starters" document for answers.

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 must 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. Here are some examples to help you understand what this means:

We may be inclined to encourage you to purchase our software model even if your investable assets are insufficient to make a reasonable return on investment because the model is priced as a one-time fixed cost.

We may buy or sell the same securities as those we recommend to our clients in personal accounts. This may create a conflict of interest if a client's transactions can affect the price of the security.

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

Visit <https://matthewmartin.tech> and view our "Conversation Starters" document for answers.

How do your financial professionals make money?

Our financial professionals make money through the payment of the \$450.00 fixed cost for our comprehensive software model. Client assets, products sold, and complexity of transactions do not affect how our financial professionals are compensated.

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 us and our financial professionals.

Additional Information

Find additional information and a copy of this relationship summary at <https://matthewmartin.tech>. A copy can also be requested via phone at (504) 559-5092.

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?

Visit <https://matthewmartin.tech> and view our "Conversation Starters" document for answers.