# Client Relationship Summary ("Form CRS") – October 2026

Datalign Advisory, Inc. ("Datalign", "we", "us", or "our") is an investment adviser registered with the U.S. Securities and Exchange Commission. Investment advisory and brokerage services and fees differ, and it is important for you, the retail investor, to understand the differences. 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?*

Through our fully interactive Internet-based platform, we match and introduce retail investors ("Consumers") with suitable third party investment advisers ("Participating Advisers") based on the Consumers' personal financial circumstance. The Participating Advisers that use the Datalign platform pay us a fee for each Consumer introduction. Our investment advisory services are limited to making these recommendations, and we do not manage any Consumer assets.

***Account Monitoring and Investment Authority*:** We do not manage assets. Therefore, we do not monitor or review accounts, or exercise any investment authority.

***Limited Investment Offerings*:** Our investment advisory services are limited to matching and introducing retail Consumers to Participating Advisers through our fully interactive Internet-based platform.

***Account Minimums and Other Requirements*:** Participating Advisers pay us a referral fee. We do not charge Consumers a fee and there is no minimum wealth requirement for using our platform. We may also receive compensation from other Financial Institutions on the basis of Financial Opportunity referrals where the Consumer selects a Financial Opportunity.

***Additional Information:* For additional Information, and a description of the service offerings, please see our Form ADV Part 2A Brochure (the "Brochure"), with special emphasis on Items 4, 5, 7, and 14, which can be found on our website datalignadvisory.com or the SEC website at adviserinfo.sec.gov. The firm CRD number is 317004.**

***Conversation Starters – Ask Your Financial Professional:***

- Given my financial situation, should I choose 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?*

***Principal Fees*:** We do not charge you a fee for using our service. Instead, Participating Advisers to which we introduce the Consumers pay us a one-time referral fee. We earn the referral fee whether or not you hire the Participating Adviser. We are paid either at the time of the introduction or at the end of the month in which the introduction was made, and payments vary depending on the Participating Adviser and Consumer. We will match and introduce you to up to three Participating Advisers based on the information you provide and the suitability of the Participating Advisers. The fees paid to us by Participating Advisers will vary based on volume of demand and the types of clients with whom they work.

***Other Fees and Costs*:** We do not charge any fees to Consumers to use the Datalign platform. However, to the extent you choose to hire a Participating Adviser, you will pay advisory fees and other charges in connection with their investment management services. You may also incur fees or charges imposed by other Financial Institutions if you sign up for or complete a Financial Opportunity.

***Additional Information*: *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***. **More detailed information about our fees and costs are included in our Brochure (Item 5).**

***Conversation Starter – Ask Your Financial Professional:***

- 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. Here are some examples to help you understand what this means.***

Participating Advisers pay us a fee for each Consumer introduction. Participating Advisers may pay different levels of fees based on a combination of demand and profile of the Consumers matched and introduced. This creates a conflict of interest because we could generate more revenue by introducing Consumers to the Participating Adviser willing to spend the most, rather than the adviser that best suits a Consumer's needs. We mitigate this risk by only introducing Consumers to Participating Advisers that are deemed suitable and match based on information Consumers self-report through our platform. Where multiple Participating Advisers meet the requirements identified by a Consumer and are deemed equally suitable, the introduction will be prioritized based on demand level and the Participating Adviser that is willing to pay us the highest referral fee, as determined through an auction. In some instances, up to three Participating Advisers will match with a Consumer and each Participating Adviser will pay us a referral fee.

***Conversation Starter – Ask Your Financial Professional:***

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

*Additional Information:* **These arrangements and additional information about other conflicts of interest are discussed in more detail in our Brochure.**

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

Our financial professionals are paid a salary based on the revenue we receive from Participating Advisers. The portion paid to our financial professionals generally does not vary based on the type of referrals we make.

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

No – Neither the firm nor our financial professionals have a disciplinary history. We invite you to visit Investor.gov/CRS for a free and simple search tool to research our firm and financial professionals.

***Conversation Starter – Ask Your Financial Professional:***

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

**We encourage you to seek out additional information about our investment advisory services in our Brochure on Investor.gov or adviserinfo.sec.gov (CRD #317004). Alternatively, you can call Datalign at 1+(781) 228-5678 to speak with us directly to request up-to-date information and request a copy of this Relationship Summary.**

***Conversation Starters – Ask Your Financial Professional:***

- 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?