

**Eagle Investors LLC**  
**Client Relationship Summary**  
**April 2024**

**1. Introduction**

Our name is Eagle Investors LLC (“**Eagle**”). We are registered with the State of Indiana, California, and Virginia. We were previously registered with the U.S. Securities and Exchange Commission (“**SEC**”) as an investment adviser. We changed registration during our 2024 annual amendment due to falling under the de minimis requirements for multi-state advisors. The services offered and fees charged by an investment adviser differ from those of broker-dealers and it is important that you understand the differences. Free and simple tools are available to research investment adviser firms, broker-dealers, and their financial professionals at [www.Investor.gov/CRS](http://www.Investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

**2. Relationships and Services**

**A. What investment services and advice can you provide me?**

**B. Description of Services.** Eagle provides investment advisory services to retail investors. Specifically, the firm provides investment research, financial advice, trading recommendations and investment recommendations regarding options, stocks, digital assets, and cryptocurrency trading to fee-based Subscribers (“Subscribers”) via the internet through the firm’s online platform. In addition, the firm provides personalized financial advice and tailored financial advice through online voice and video calls to one-time, fee-based clients via the internet.

- (i) *Monitoring:* Eagle does not have regulatory assets under management, and we do not expect to maintain client assets under management.
- (ii) *Investment Authority:* Our investment services are non-discretionary and available to our Subscribers via an ongoing fee-based subscription and one-time fees. This means that the retail investor makes the ultimate decision regarding the purchase or sale of investments.
- (iii) *Limited Investment Offerings:* Eagle only provides its Subscriber-based service and one-time fee based services.
- (iv) *Account Minimums and Other Requirements:* There are no account minimums to become a Subscriber.

**C. Additional Information:** Please see the more detailed disclosure on the investment services and advice that we can provide to you in Items 4 and 7 of our Form ADV Part 2A. In addition, please find our full public disclosures and policies here: <https://eagle-investors.com/disclaimer/>

**D. 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?**

**3. Fees, Costs, Conflicts, and Standard of Conduct**

**A. What fees will I pay?**

- (i) *Description of Principal Fees and Costs:* The fees applicable to Subscribers are set forth in detail in each Subscriber’s “**Advisory Contract.**” Subscribers pay Eagle a “**Subscription Fee**” that will range from \$67 Monthly to \$670 Annually for the Premium Membership. In addition, the fees applicable to Fixed Fee Based Customers are set forth in detail in each Customers “**Advisory Contract.**” Customers pay Eagle a “**Fixed Fee**” that will range from \$786 to \$2,497 for 1on1 advising. Please reference our Firm’s Brochures, always publicly available here: <https://eagle-investors.com/form-adv-part-2a/> for additional information about fees.
- (ii) *Description of Other Fees and Costs:* There are no other fees or expenses charged to Subscribers and Clients.
- (iii) *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.** Subscribers pay only the Subscription Fee. One-Time Customers pay only the Fixed Fee.
- (iv) **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?**
- B. 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?**
  - (i) **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.**
  - (ii) *Examples of Ways We Make Money and Conflicts of Interest:* Eagle has no affiliations with any parties other than our Subscribers and Customers. We continuously monitor and analyze the research we provide to ensure that it conforms with the internal guidelines of each Advisory Contract. Currently, subscriptions and fixed fees are the only way by which the Adviser makes any profit. The subscription fee will not be materially raised without discussion and agreement with the Subscribers. Additionally, there are potential scenarios in which certain users may display real life or hypothetical trading on the Discord platform, and other channels utilized by the Adviser. To that end, the Adviser conducts extensive Compliance Training with each of its Employees on a regular basis with regards to regulatory requirements in what can be posted. Have set up Compliance guardrails to review all personal trading for all Employees' associated accounts and actual conflicts of interest. This will include quarterly certifications that Employees would attest and confirm no access to potential MNPI during the previous quarter.
  - (iii) **Conversation Starters:**
    - **How might your conflicts of interest affect me, and how will you address them?**  
**Additional Information:** Please see the more detailed disclosure about our conflicts of interest in Item 10 & Item 11 of our Form ADV Part 2A, always publicly available here: <https://eagle-investors.com/form-adv-part-2a>.
- C. How do your financial professionals make money?** Eagle does not employ financial professionals that are compensated separately from the Subscription Fee or Fixed Fee paid by our Subscribers and Customers.

#### **Disciplinary History**

- A. Do you or your financial professionals have legal or disciplinary history?** Yes, Ishaan Sandhir has been subject to minor criminal proceedings in the past. Specifically, in late 2017 he was charged in the State of Indiana with the following crimes: 35-48-4-2(a)(2)/F6: Dealing in a Schedule II Controlled Substance 35-48-4-11(a)(1)/MB: Possession of Marijuana In early 2018, the first charge was dismissed, and the second charge was a guilty plea resulting in a misdemeanor conviction. However, it is important to note that: This conviction was not related to any investment or securities activities. He has never been convicted of any felony charges.  
 He is committed to upholding the highest ethical standards in all business dealings.  
 We strongly believe in transparency and ethical conduct. Ishaan Sandhir has provided full disclosure of this historical event to the firm and regulators.  
 This past event does not impact the principal's ability to effectively manage Eagle Investors LLC or provide investment guidance.
- (i) Please visit [www.Investor.gov/CRS](http://www.Investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.
- (ii) **Conversation Starters:**
  - **As a financial professional, do you have any disciplinary history? For what type of conduct?**

#### **4. Additional Information**

- A. You can find additional information about our investment advisory services on the SEC's website and on our website. Our website is <https://eagle-investors.com/>.
- B. You can request up to date information and a copy of our relationship summary by contacting us at (248) 703-9394 or by email at [samuel@eagle-investors.com](mailto:samuel@eagle-investors.com).
- C. **Conversation Starter:**
  - **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?**