

**Perkea Capital Securities Inc Customer  
Relationship Summary (Form CRS)**

Confidential — For Accredited Investors Only

September,5,2016

## **1. About Us**

Perkea Capital Securities Inc is an SEC-registered investment management firm dedicated to providing professional asset management services to accredited investors. Our mission is to help clients achieve wealth growth through disciplined and research-driven investment strategies.

## **2. Services and Fees**

We primarily offer **personalized investment management services**, helping clients **customize their asset portfolios**. Our fees are based on a **percentage of assets under management (AUM)**, with specific rates varying by account size.

Please note that **fees reduce your investment returns**, and detailed fee schedules are available upon request from your relationship manager.

## **3. Investment Advice and Strategy**

Our investment strategy combines **value investing** and **growth investing** principles, with **diversified allocation across multiple asset classes**. Investment decisions are based on **rigorous market analysis and risk assessment**, aiming to achieve capital appreciation while controlling risk.

## **4. Risk Disclosure**

Investing involves risks, including **market volatility** and **liquidity risks**. Clients may experience **partial or total loss of principal**.

While we maintain risk management procedures, **investment risks**

**cannot be completely eliminated.**

## **5. Client Rights and Responsibilities**

Clients have the **right to receive transparent information** regarding our services and fees.

Clients are responsible for **providing accurate information about their investment objectives and risk tolerance.**

Any questions can be addressed to **your relationship manager or the relevant regulatory authority.**

## **6. Material Relationships and Conflicts of Interest**

The firm may encounter **situations where conflicts of interest arise.**

We implement **strict compliance measures to protect client interests,** and any **material conflicts will be disclosed promptly.**

## **7. Investor Suitability Statement**

Our services are **intended for accredited investors with some investment experience and the ability to tolerate market risk.**

Clients are required to **complete a risk tolerance assessment** to ensure our services are suitable for their investment profile.