

Form ADV Part 3 – Client Relationship Summary

Date: 05/20/2020

Item 1: Introduction

GLOBAL STRATEGIC INVESTMENT SOLUTIONS is an investment adviser registered with the Securities and Exchange Commission offering advisory accounts and related services. Investment advisory services and fees differ, and it is important that you understand the differences. This document gives you a summary of the types of services we offer and the fees we charge for our services.

Please visit <http://www.investor.gov/CRS> for free, simple tools to research firms and for educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

Questions to ask us: 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 investment services and advice can you provide me? Our firm primarily offers the following investment advisory services to retail clients, high net worth individuals, foundations, and endowments. Portfolio Management: We review your portfolio and investments and give you a written Investment Policy Statement (IPS) for your approval. Once approved, we execute against this IPS on your behalf. Occasionally, we will select an outside advisor to execute certain of our strategies on your behalf. As part of our standard services, we typically monitor client accounts on a daily basis. Our firm offers both discretionary advisory services (where our firm makes the decision regarding the purchase or sale of investments) as well as non-discretionary services (where the retail investor makes the ultimate decision). We do not limit the types of investments that we recommend. We don't have an account minimum.

Please also see our Form ADV Part 2A (“Brochure”), specifically Items 4 & 7.

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

Questions to ask us: Help me understand how these fees and costs might affect my investments. If I invested \$1,000,000 with you, how much will go to fees and costs, and how much will be invested for me? How might your conflicts of interest affect me, and how will you address them?

What fees will I pay? Our fees do not vary depending on the services you receive. The amount of assets in your account affects our advisory fee; the more assets you have in

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your advisory account, the more you will pay us and thus we have an incentive to grow those assets in order to increase our fee. We charge our fees monthly in arrears. You pay our fees even if you do not have any transactions and the advisory fee paid to us does not vary based on the type of investments selected.

Please also see Items 4, 5, 6, 7 & 8 of our [Brochure](#).

Some investments (e.g., mutual funds, exchange traded funds, etc.) charge additional fees (e.g., transactional fees and product-level fees) that reduce the total return of your investment over time. The same is true for any additional fees you pay to a custodian. If applicable, you will pay transaction fees to a broker (not affiliated with us) when we buy or sell an investment for your account. **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.**

Please also see our [Brochure](#) for additional details.

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. We do not sell any proprietary products or participate in brokerage or revenue sharing programs that would otherwise create conflicts between us. Our only source of revenues are our direct fees from clients.*

How do your financial professionals make money? We and our financial professionals only receive compensation for the advisory services we provide from the advisory fees we receive from you. This compensation may vary based on your assets under management with us.

Please also see Item 10 of our [Brochure](#) for additional details.

Item 4: Disciplinary History

Questions to ask us: As a financial professional, do you have any disciplinary history? For what type of conduct?

Do you or your financial professionals have legal or disciplinary history? We do not have legal and disciplinary events. Visit <https://www.investor.gov/> for a free, simple search tool to research us and our financial professionals.

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Item 5: Additional Information

Questions to ask us: 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?

Your primary contact is the Investment Officer assigned to your account. If you have any concerns about your relationship with the firm please call our Chief Compliance Officer, Donald E. Callaghan, at 480-935-2134 or his cell at 215-919-3116 or email him at dcallaghan@gsisus.com.

For additional information on our advisory services, see our [Brochure](#) available at <https://adviserinfo.sec.gov/firm/summary/175300> and any individual brochure supplement your representative provides. If you have any questions, need additional up-to-date, or want another copy of this Client Relationship Summary, then please contact us at 480-935-2210.

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Exhibit A – Material Changes to Client Relationship Summary

This is the initial version of the Client Relationship Summary. There are no material changes.