GET RICH SLOWLY LLC

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PART 2A OF FORM ADV: FIRM BROCHURE
MARCH 10, 2026

This brochure provides information about the qualifications and business practices of Get Rich Slowly LLC. If you have any questions about the contents of this brochure, please contact us at inquiries@getrichslowly.llc. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Additional information about Get Rich Slowly LLC (CRD number 325584) also is available on the SEC's website at www.adviserinfo.sec.gov.

Registration of an investment adviser does not imply attainment of a certain level of skill or training.

Item 2: Summary of Material Changes

This summary of material changes reflects material changes in this brochure since our last filing, dated January 28, 2025.

Item 11: Code of Ethics, Participation or Interest in Client Transactions, and Personal Trades on page 14 of this brochure is amended to disclose that Get Rich Slowly LLC's Code of Ethics is adapted from, and complies with, the CFA Institute Asset Manager Code. Accordingly, references to The American College of Financial Services and its Code of Ethics have been removed from **Item 11: Code of Ethics, Participation or Interest in Client Transactions, and Personal Trades**.

Otherwise, no material changes from prior filings are noted.

Item 3: Table of Contents

Item 4: Advisory Business

Get Rich Slowly LLC is a Washington limited liability company founded in 2023 and registered as an investment adviser in 2024. Get Rich Slowly LLC is principally owned by Bentley Makkar, an individual.

Get Rich Slowly LLC offers portfolio management services and advisory services to clients and prospective clients. Advisory services may include: investment advisory services, personal financial planning services, personal United States federal tax planning services, and any related services. Personal financial planning services may include: retirement planning, budgeting and cash flow planning, risk management and insurance planning, planning for education funding, lump sum purchase planning, legacy planning, charitable planning, and any related services. Please reference **Item 7: Types of Clients**.

We specialize in long-term passive index investing strategies utilizing market capitalization weighted index mutual funds and exchange traded funds (ETFs). Our portfolio management and investment advisory strategies involve low investment turnover, minimization of transaction costs, and minimization of tax costs with the intention of maximizing net investment returns for clients over a long investment holding period. Such a strategy is commonly termed a "buy and hold" strategy. Please reference **Item 8: Methods of Analysis, Investment Strategies, and Risk of Loss**.

Our portfolio management services and investment advisory services are limited to equity securities, fixed income securities, cash and money market securities, mutual funds, exchange traded funds (ETFs), and real estate investment trusts (REITs). We do not offer portfolio management services or investment advisory services in relation to futures contracts, options contracts, other derivative securities, commodities, currencies, cryptocurrencies, leveraged funds, inverse funds, collectibles, or other investments of a speculative nature.

Advisory services are tailored to the individual needs of our clients. In general, this follows a systematic process:

1. Understanding our client's financial and non-financial circumstances.
2. Assisting our client in formulating and selecting financial and non-financial objectives.
3. Analyzing our client's current courses of action and potential alternative options.
4. Formulation of recommendations by Get Rich Slowly LLC.
5. Presentation of recommendations to our client and refinement of recommendations by Get Rich Slowly LLC.
6. Optionally, implementation of recommendations by Get Rich Slowly LLC, if within the scope of our portfolio management services. Clients assume sole responsibility for implementation of all other recommendations delivered by Get Rich Slowly LLC.
7. Optionally, periodic monitoring of progress towards achieving our client's objectives and updating of recommendations by Get Rich Slowly LLC. This requires selection of the flat-fee subscription (retainer fees) option for advisory services and is unavailable to clients selecting the hourly fees billing option for advisory services. Please reference **Item 5: Fees and Compensation**.

Get Rich Slowly LLC offers to manage client assets on a discretionary basis. Clients may impose restrictions limiting the purchase or sale of certain securities or types of securities within client accounts maintained by our custodian broker-dealer Interactive Brokers LLC. Please reference **Item 16: Investment Discretion**.

Get Rich Slowly LLC does not participate in wrap fee programs.

As of the date of this brochure, Get Rich Slowly LLC manages the following values of client assets in aggregate (rounded to the nearest $100,000):

- Client assets managed on a discretionary basis: $2,500,000 (approximately)
- Client assets managed on a non-discretionary basis: $0 (approximately)

Item 5: Fees and Compensation

Get Rich Slowly LLC is a fee-only adviser. We are compensated exclusively from fees billed directly to our clients for our advisory services and portfolio management services. We do not receive sales commissions, bonuses or other incentives for the sale or recommendation of products or services, bonuses or other incentives for achieving sales targets or metrics, compensation for referrals of our clients to third-parties, payments for order flows, or other third-party sourced financial or non-financial compensation. Please reference **Item 14: Client Referrals and Other Compensation**.

Our schedule of fees is divided into fees for advisory services and fees for optional add-on portfolio management services. We offer several flexible billing options to accommodate client needs and preferences. All prices are expressed in United States dollars (USD). As of the date of this brochure:

Billing options for advisory services (select only one of the two options below):

1. Hourly fees option:
   - $258 per hour. Billed in increments of ½ hour (increments of $129).
   - An open-ended engagement billed in arrears as a series of limited engagements: billed upon conclusion of each limited engagement. Each limited engagement within a series of limited engagements is initiated by clients. Fees are never incurred by clients for services that are not rendered to clients by Get Rich Slowly LLC.
   - Not eligible to select optional add-on portfolio management services as discussed below.
2. Flat-fee subscription (retainer fees) option:
   - For individuals with less than $5,000,000 in assets: $172 monthly, or $2,064 annually.
   - For households consisting of two individuals with unified finances and less than $5,000,000 in assets (inclusive of marital relationships, legally recognized cohabitation agreements, or dependents): $215 monthly, or $2,580 annually.
   - For households consisting of more than two individuals with unified finances (inclusive of marital relationships, legally recognized cohabitation agreements, or dependents), for clients owning privately held companies, for clients who are not natural persons (inclusive of organized business entities, charitable organizations, trusts, or estates), and for clients with $5,000,000 in assets or greater: $258 monthly, or $3,096 annually.
   - An open-ended engagement billed in arrears monthly: billed upon conclusion of each monthly billing period. Fees are never incurred by clients for services that are not rendered to clients by Get Rich Slowly LLC.
   - Eligible to select optional add-on portfolio management services as discussed below. Fees for advisory services are billed separately from, and in addition to, fees for optional add-on portfolio management services.

Assets under management (AUM) fees for optional add-on portfolio management services:

- A tiered schedule of fees billed as a percentage of client assets under our management, with annual nominal fee rates of 0.05% and 0.10% applied to different asset bands according to our asset thresholds:
  - For your first $1,000,000.00 in assets under our management: 0.10% annual nominal fee rate.
  - For your assets under our management beginning at $1,000,000.01 or greater: 0.05% annual nominal fee rate.

- An open-ended engagement billed in arrears monthly: annual nominal fee rates are applied on a *pro rata* basis each business day, apportioned over the total number of business days each year, and billed upon conclusion of each monthly billing period. Fees are calculated by our custodian broker-dealer upon the aggregate net liquidation value of client assets under our management marked-to-market each business day. Fees are never incurred by clients upon the value of client assets not under our management.
- Portfolio management services require concurrent selection of the flat-fee subscription (retainer fees) option for advisory services as discussed above. Fees for optional add-on portfolio management services are billed separately from, and in addition to, fees for advisory services.
- Portfolio management services require a minimum of $10,000 in starting client assets under management by Get Rich Slowly LLC.

Fees incurred by clients for advisory services, exclusive of fees incurred by clients for optional add-on portfolio management services, are invoiced by Get Rich Slowly LLC to clients for payment. Methods of payment accepted for advisory services include, but are not limited to, credit card payments, debit card payments, and bank account direct debit payments via Automated Clearing House (ACH) network. We may offer additional methods of payment to clients at our sole discretion.

If client assets are maintained by our custodian broker-dealer Interactive Brokers LLC, fees billed to clients by Get Rich Slowly LLC for portfolio management services, exclusive of fees incurred by clients for advisory services, are debited by Interactive Brokers LLC directly and automatically from client accounts. Please reference **Item 10: Other Financial Industry Activities and Affiliations** and **Item 16: Investment Discretion**.

Whenever Get Rich Slowly LLC bills fees to clients, billing invoices are submitted to clients. Our billing invoices disclose fees incurred by clients, formulas for fee calculations, fee calculations, and billing periods covered by fees. If applicable, our billing invoices also include the value of client assets under our management upon which our fees are incurred and the name of our custodian broker-dealer.

You may cancel our services at any time and for any reason without further obligations or commitments:

- Advisory services invoiced by hourly billing or as limited engagements may be discontinued at any time. Updated invoices accounting for work that has already been performed by Get Rich Slowly LLC (billed in increments of ½ hour) will be delivered to clients and must be paid in full. Any continuing engagements or services previously requested by clients and yet to be performed by Get Rich Slowly LLC will be canceled without further obligations.
- Advisory services invoiced by monthly billing may be discontinued at any time and without further obligations. Fees for future billing periods will not be billed to clients. If advisory services are discontinued prior to end of the current billing period, fees will not be billed to clients for advisory services within the current billing period.
- Optional add-on portfolio management services may be discontinued at any time and without further obligations. Prorated fees accrued by clients within the current billing period must be paid in full. Fees for remaining days within the current billing period and fees for future billing periods will not be billed to clients.

In addition to fees for advisory services and fees for optional add-on portfolio management services billed by Get Rich Slowly LLC, you may incur additional costs associated with the implementation of our recommendations, including mutual fund expense ratios, exchange traded fund (ETF) expense ratios, margin debt interest, and brokerage or other transaction costs, such as brokerage commissions for trade executions, regulatory fees, exchange fees, clearing fees, or pass-through fees. Please reference **Item 12: Brokerage Practices**. Please reference your securities prospectus, margin agreement, or brokerage agreement for additional details.

Our schedule of fees is subject to periodic review and revision. This is necessary to account for our operating needs and expenses, effects of inflation, market forces, and to remain competitive with fees charged by our competitors. Please reference www.getrichslowly.llc for a complete and up to date schedule of our fees, including full terms and conditions of billing.

Our fees as stated are non-negotiable.

Item 6: Performance-Based Fees and Side-By-Side Management

Get Rich Slowly LLC does not accept performance-based fees.

Item 7: Types of Clients

Get Rich Slowly LLC offers portfolio management services and investment advisory services to the following types of clients:

- Individuals and their families.
- Individuals possessing a large net worth.
- Professionals, including physicians and advanced practice providers.
- Individuals owning privately held companies.
- Organized business entities, including partnerships, limited liability companies (LLCs), and corporations.
- Charitable organizations.
- Trusts.
- Estates.

Personal financial planning services and personal United States federal tax planning services are offered to the following types of clients:

- Individuals and their families.
- Individuals possessing a large net worth.
- Professionals, including physicians and advanced practice providers.
- Individuals owning privately held companies.

Portfolio management services require a minimum of $10,000 in starting client assets under management by Get Rich Slowly LLC. Please reference **Item 5: Fees and Compensation**.

Item 8: Methods of Analysis, Investment Strategies, and Risk of Loss

Please reference **Item 4: Advisory Business**. Additionally, please reference www.getrichslowly.llc for a detailed discussion regarding investment policies and strategies employed by Get Rich Slowly LLC.

Methods of analysis and investment strategies:

Get Rich Slowly LLC specializes in long-term passive index investing strategies utilizing market capitalization weighted index mutual funds and exchange traded funds (ETFs). Generally, our portfolio recommendations include allocations towards equity security index funds, fixed income index funds, cash and money market securities, and potentially real estate investment trust (REIT) index funds.

We do not engage any methods of securities analysis (e.g., technical analysis or fundamental analysis), active management strategies (e.g., stock picking, fund picking, or market timing), or short-term trading strategies. Our portfolio management and investment advisory strategies involve low investment turnover, minimization of transaction costs, and minimization of tax costs with the intention of maximizing net investment returns for clients over a long investment holding period. Such a strategy is commonly termed a "buy and hold" strategy.

We disfavor the use of leveraged portfolio strategies. Generally, desired portfolio risk level is most effectively achieved through appropriate asset allocations rather than by application of leverage to the investment portfolio. Portfolio leverage utilizing margin borrowing may be considered upon written request of clients on a case-by-case basis and conditional upon our approval. We will generally consider requests by clients already fully allocated to equity securities within their investment portfolios who desire a portfolio risk level in excess of what a market portfolio can deliver, and who possess: a willingness to bear increased portfolio risk (high risk tolerance), a financial capacity to bear increased portfolio risk (high risk capacity), a long investment time horizon (generally ≥ 10 years), a long-term investor outlook, and qualifications for portfolio margin (risk-based margin policy). We may consider requests by clients for portfolio strategies employing limited margin leverage (generally limited to initial margin ≥ 75%, where initial debt ≤ 25% of collateral assets) at favorable interest rates to satisfy short- and intermediate-term credit and liquidity needs of our clients.

Risk of loss:

All investments are inextricably tied with the risk of loss, including loss of your principal or more.

Choosing to invest in securities involves exposure to multiple risks, which may be broadly divided into systematic risks and unsystematic risks (idiosyncratic risks). The combination of these risks equals the total risk of your investment portfolio.

Examples of systematic risks include (but are not limited to):

- Market risk: Variability in asset prices consequent to changes in economic or market conditions.
- Interest rate risk: Variability in asset prices consequent to changes in prevailing interest rates or yields.
- Reinvestment rate risk: Variability in the terminal value of any asset consequent to changes in the rate of return for reinvested earnings.
- Purchasing power risk (inflation risk): A decline in the purchasing power of any asset consequent to price inflation.
- Exchange rate risk: Variability in asset prices consequent to changes in relative valuations of currencies.

Examples of unsystematic risks or idiosyncratic risks include (but are not limited to):

- Political risk (government risk and country risk): Variability in asset prices consequent to changes in legal, regulatory, or political environments within any territory in which assets are domiciled.
- Expropriation risk: Risk of any government, lawfully or unlawfully, expropriating or seizing privately owned assets for public use, counter to the wishes of investors and potentially without fair compensation to investors.
- Default risk (credit risk): Risk to creditors of any business that the debtor may be unable to meet debt and interest obligations, with potential loss incurred by creditors if collateral assets are insufficient to cover debt and interest obligations.
- Financial risk: Risk associated with use of debt or leverage within any business.
- Executive risk: Risk associated with decision-making by officers or executives of any business, potentially consequent to erroneous decision-making or fraud.
- Business risk: Risk inherent to any specific business, or the uncertainty of operating income for any specific business.
- Accounting risk: Risk that financial statements do not accurately reflect the financial condition of any business, potentially consequent to accounting error or fraud.
- Call risk: Risk that a callable fixed income security will be called by its issuer, exposing investors to reinvestment rate risk. Fixed income securities may include call features, allowing issuers to call these securities when interest rates decline, prior to their scheduled maturity dates.
- Liquidity risk and marketability risk: Liquidity risk is risk that an investor may not be readily able, or may be unable, to sell an investment expediently and without loss of principal or compromise in sale price. Marketability risk is risk that an investor may not be readily able, or may be unable, to find a market in which to sell an investment. Liquidity risk may be measured by the spread between the bid price and ask price (bid-ask spread) of any security. Wider bid-ask spreads indicate greater liquidity risk.

Investing in market capitalization weighted index mutual funds or exchange traded funds (ETFs) offers many advantages including broad diversification, efficiencies of securities markets, and low costs. While broad diversification may reduce the total risk of your portfolio by reducing or materially eliminating unsystematic or idiosyncratic risks, systematic risks cannot be mitigated by diversification and may expose you to the risk of loss, including loss of your principal or more.

Engaging in margin borrowing involves additional risks, which may include (but are not limited to): rehypothecation risk (the re-pledging of your pledged collateral assets against a margin liability as collateral security against your creditor's own debt obligations, which may then be further re-pledged to other creditors, risking your pledged collateral assets to any potential default within this chain of credit), variable and generally high interest rates, variable margin requirements (house margin requirements may exceed regulatory margin requirements and can be modified by the broker-dealer at any time without prior notice to borrowers), unpredictable margin calls and / or liquidations of account positions (margin debts can be called at any time and for any reason and account positions can be liquidated by the broker-dealer without margin calls or prior notice), possible lending by the broker-dealer of securities purchased using margin debt, possible inability to transfer positions from accounts with outstanding margin debt, compounding of margin debt due to negative amortization or capitalization of interest, and risk of realizing losses (which may exceed your principal) during margin calls / liquidation events or upon the insolvency of your collateral assets. Please reference your margin borrowing agreement for additional details.

Choosing not to invest or choosing to invest solely in assets with low expected volatilities in order to minimize portfolio volatility guarantees the long-term inflationary erosion of your purchasing power (purchasing power risk) and exposes you to the risk of outliving your assets (longevity risk).

Item 9: Disciplinary Information

Get Rich Slowly LLC and its management have no material facts to disclose regarding legal or disciplinary events, which may include criminal or civil actions, administrative proceedings before regulatory agencies, or self-regulatory organization (SRO) proceedings.

Item 10: Other Financial Industry Activities and Affiliations

Get Rich Slowly LLC and its management have no disclosures pertaining to financial industry activities or affiliations external to our advisory services, which may include registration as: a broker-dealer, representative of a broker dealer, futures commission merchant, commodity pool operator, commodity trading adviser, or an associated person of any of the foregoing entities.

Get Rich Slowly LLC engages the services of independent third-party broker-dealers to maintain custody of all client assets managed by Get Rich Slowly LLC. As of the date of this brochure, our custodian broker-dealer is Interactive Brokers LLC. This arrangement between Get Rich Slowly LLC and Interactive Brokers LLC does not pose any material conflicts of interest to clients of Get Rich Slowly LLC. Interactive Brokers LLC is engaged within the scope of this agreement exclusively for services as a custodian of client assets and for brokerage services, including for transfers of assets, executions of trades, record keeping, and client billing. Any fees, commissions, or charges for these services received by Interactive Brokers LLC are billed by Interactive Brokers LLC directly and independently to clients. Get Rich Slowly LLC receives no compensation nor share of revenues derived by Interactive Brokers LLC for this arrangement. Similarly, Get Rich Slowly LLC offers no compensation for this arrangement nor share of revenues derived from our advisory business to Interactive Brokers LLC. Interactive Brokers LLC does not influence or direct any advisory services offered by Get Rich Slowly LLC to our clients by any financial or non-financial methods, such as by incentivizing Get Rich Slowly LLC to recommend specific products or services to our clients.

Item 11: Code of Ethics, Participation or Interest in Client Transactions, and Personal Trades

Get Rich Slowly LLC's Code of Ethics ("the Code") is adapted from, and complies with, the CFA Institute Asset Manager Code[*]. A copy of the Code will be made available to clients and prospective clients upon request. The CFA Institute Asset Manager Code, current as of the date of this brochure, is herein summarized:

General Principles of Conduct

Managers have the following responsibilities to their clients. Managers must:

1. *Act in a professional and ethical manner at all times.*
2. *Act for the benefit of clients.*
3. *Act with independence and objectivity.*
4. *Act with skill, competence, and diligence.*
5. *Communicate with clients in a timely and accurate manner.*
6. *Uphold the applicable rules governing capital markets.*

Asset Manager Code

A. *Loyalty to Clients*

   Managers must:

   1. *Place client interests before their own.*
   2. *Preserve the confidentiality of information communicated by clients within the scope of the Manager-client relationship.*
   3. *Refuse to participate in any business relationship or accept any gift that could reasonably be expected to affect their independence, objectivity, or loyalty to clients.*

B. *Investment Process and Actions*

   Managers must:

   1. *Use reasonable care and prudent judgment when managing client assets.*
   2. *Not engage in practices designed to distort prices or artificially inflate trading volume with the intent to mislead market participants.*
   3. *Deal fairly and objectively with all clients when providing investment information, making investment recommendations, or taking investment action.*
   4. *Have a reasonable and adequate basis for investment decisions.*
   5. *When managing a portfolio or pooled fund according to a specific mandate, strategy, or style:*
      a. *Take only investment actions that are consistent with the stated objectives and constraints of that portfolio or fund.*
      b. *Provide adequate disclosures and information so investors can consider whether any proposed changes in the investment style or strategy meet their investment needs.*
   6. *When managing separate accounts and before providing investment advice or taking investment action on behalf of the client:*
      a. *Evaluate and understand the client's investment objectives, tolerance for risk, time horizon, liquidity needs, financial constraints, any unique circumstances (including tax considerations, legal or regulatory constraints, etc.), and any other relevant information that would affect investment policy.*

[*] Get Rich Slowly LLC claims compliance with the CFA Institute Asset Manager Code. This claim has not been verified by the CFA Institute.

b. Determine that an investment is suitable to a client's financial situation.

C. Trading

Managers must:

1. *Not act or cause others to act on material nonpublic information that could affect the value of a publicly traded investment.*
2. *Give priority to investments made on behalf of the client over those that benefit the Managers' own interests.*
3. *Use commissions generated from client trades to pay for only investment-related products or services that directly assist the Manager in its investment decision making process, and not in the management of the firm.*
4. *Maximize client portfolio value by seeking best execution for all client transactions.*
5. *Establish policies to ensure fair and equitable trade allocation among client accounts.*

D. Risk Management, Compliance, and Support

Managers must:

1. *Develop and maintain policies and procedures to ensure that their activities comply with the provisions of this Code and all applicable legal and regulatory requirements.*
2. *Appoint a compliance officer responsible for administering the policies and procedures and for investigating complaints regarding the conduct of the Manager or its personnel.*
3. *Ensure that portfolio information provided to clients by the Manager is accurate and complete and arrange for independent third-party confirmation or review of such information.*
4. *Maintain records for an appropriate period of time in an easily accessible format.*
5. *Employ qualified staff and sufficient human and technological resources to thoroughly investigate, analyze, implement, and monitor investment decisions and actions.*
6. *Establish a business-continuity plan to address disaster recovery or periodic disruptions of the financial markets.*
7. *Establish a firmwide risk management process that identifies, measures, and manages the risk position of the Manager and its investments, including the sources, nature, and degree of risk exposure.*

E. Performance and Valuation

Managers must:

1. *Present performance information that is fair, accurate, relevant, timely, and complete. Managers must not misrepresent the performance of individual portfolios or of their firm.*
2. *Use fair-market prices to value client holdings and apply, in good faith, methods to determine the fair value of any securities for which no independent, third-party market quotation is readily available.*

F. Disclosures

Managers must:

1. *Communicate with clients on an ongoing and timely basis.*
2. *Ensure that disclosures are truthful, accurate, complete, and understandable and are presented in a format that communicates the information effectively.*
3. *Include any material facts when making disclosures or providing information to clients regarding themselves, their personnel, investments, or the investment process.*
4. *Disclose the following:*
    a. *Conflicts of interests generated by any relationships with brokers or other entities, other client accounts, fee structures, or other matters.*
    b. *Regulatory or disciplinary action taken against the Manager or its personnel related to professional conduct.*

c. *The investment process, including information regarding lock-up periods, strategies, risk factors, and use of derivatives and leverage.*
d. *Management fees and other investment costs charged to investors, including what costs are included in the fees and the methodologies for determining fees and costs.*
e. *The amount of any soft or bundled commissions, the goods and / or services received in return, and how those goods and / or services benefit the client.*
f. *The performance of clients' investments on a regular and timely basis.*
g. *Valuation methods used to make investment decisions and value client holdings.*
h. *Shareholder voting policies.*
i. *Trade allocation policies.*
j. *Results of the review or audit of the fund or account.*
k. *Significant personnel or organizational changes that have occurred at the Manager.*
l. *Risk management processes.*

Get Rich Slowly LLC owes clients a fiduciary duty to place the interests of clients above our own interests within the scope of our advisory services and portfolio management services. Our fiduciary duty to clients includes, but is not limited to, a duty of care, loyalty, obedience, and utmost good faith.

Get Rich Slowly LLC and its management, investment adviser representatives, and employees hold no material financial interests in any securities that we recommend to clients or purchase or sell within client accounts.

Get Rich Slowly LLC and its management, investment adviser representatives, and employees may invest in the same securities, or securities related or similar to those securities, that we recommend to clients or purchase or sell within client accounts, including the potential purchase or sale of the same securities, or securities related or similar to those securities, at or about the same time as recommended to clients or purchased or sold within client accounts. These investments are generally limited to mutual funds or exchange traded funds (ETFs), cash and money market securities, and / or U.S. federal government debt obligations. We advise our clients to purchase the same securities, or securities related or similar to those securities, in which we choose to invest our own assets. Our investment activities are not informed by the investment activities of our clients and do not occur in coordinated conjunction with, or opposition to, the investment activities of our clients. This practice does not pose any material conflicts of interest for our clients as our long-term passive index investing strategies do not depend upon short-term market fluctuations to derive profits.

Item 12: Brokerage Practices

Factors considered in the selection or recommendation of broker-dealers by Get Rich Slowly LLC for client transactions include: costs of brokerage services to Get Rich Slowly LLC and to our clients, transparency of pricing, transparency and quality of order executions (e.g., whether broker-dealers receive or are influenced by payments for order flows), availability of brokerage features to Get Rich Slowly LLC and to our clients, ease and speed of asset transfers, ease and speed of order executions, security practices of the broker-dealer, financial strength of the broker-dealer, interest rates offered by the broker-dealer to our clients on idle cash balances and margin debts, adviser and client experiences with the brokerage platform, and adviser and client knowledge of the brokerage platform.

We do not receive research or other products or services (soft dollar arrangements or investment manager-directed brokerage arrangements) other than order executions from broker-dealers or third-parties in connection with client securities transactions.

We do not receive client referrals from broker-dealers, nor do we consider client referrals from broker-dealers in selecting or recommending broker-dealers to our clients.

We do not offer client-directed brokerage arrangements.

We do not engage in any practice of aggregating transactions for the coordinated purchase or sale of securities across different client accounts. In some instances, aggregation of client transactions to effect larger order blocks may offer superior price executions, volume discounts for brokerage commissions, or reduced transaction-related costs and fees.

Item 13: Review of Accounts

Get Rich Slowly LLC recommends periodic review of client accounts and financial plans, generally on a semi-annual basis. Review is recommended following consequential life events, including marriages, divorces, births, deaths, inheritances, windfalls, losses of employment, significant changes in employment, significant relocations, disaster events, and other significant events. Additionally, review may be conducted at the discretion of Get Rich Slowly LLC or requested at the discretion of our clients. Reviews are conducted by investment adviser representatives employed by Get Rich Slowly LLC who have been assigned to clients undergoing review.

Review of client accounts and financial plans may include one or multiple advising disciplines, including investment advising, tax planning, retirement planning, budgeting and cash flow planning, risk management and insurance planning, planning for education funding, lump sum purchase planning, legacy planning, and charitable planning. Written reports are provided to clients detailing our recommendations following review.

Item 14: Client Referrals and Other Compensation

Get Rich Slowly LLC is a fee-only adviser. We are compensated exclusively from fees billed directly to our clients for our advisory and portfolio management services. We do not receive sales commissions, bonuses or other incentives for the sale or recommendation of products or services, bonuses or other incentives for achieving sales targets or metrics, compensation for referrals of our clients to third-parties, payments for order flows, or other third-party sourced financial or non-financial compensation.

We do not compensate, directly or indirectly, any third-parties for client referrals.

Item 15: Custody

Get Rich Slowly LLC does not maintain custody of client funds or securities at any time, directly or indirectly.

Clients receiving optional add-on portfolio management services from Get Rich Slowly LLC will receive periodic account statements directly from our custodian broker-dealer. Clients should carefully review these statements and compare these statements with any invoices or statements received from Get Rich Slowly LLC. Please reference **Item 10: Other Financial Industry Activities and Affiliations**.

Item 16: Investment Discretion

Get Rich Slowly LLC offers optional add-on portfolio management services to clients and prospective clients. If clients elect to receive our portfolio management services, we accept discretionary authority to manage securities accounts on behalf of our clients. Prior to accepting discretionary authority from clients, a written agreement is authorized by clients granting Get Rich Slowly LLC a revocable limited power of attorney to manage assets on behalf of our clients.

Discretionary authority permits and authorizes Get Rich Slowly LLC to decide which securities to purchase or sell within client accounts and to enter transaction orders for purchase or sale of securities within client accounts maintained by our custodian broker-dealer Interactive Brokers LLC, including for transactions involving margin leverage, if leveraging of the investment portfolio is requested in writing by clients and agreed upon by Get Rich Slowly LLC. Additionally, discretionary authority permits and authorizes Get Rich Slowly LLC to direct our custodian broker-dealer Interactive Brokers LLC to debit client accounts automatically for fees billed to clients by Get Rich Slowly LLC for portfolio management services, as authorized by our clients via advance written agreement. Please reference **Item 5: Fees and Compensation**, **Item 8: Methods of Analysis, Investment Strategies, and Risk of Loss**, and **Item 10: Other Financial Industry Activities and Affiliations**.

Discretionary authority does not permit or authorize Get Rich Slowly LLC to withdraw client funds or securities maintained by our custodian broker-dealer Interactive Brokers LLC upon our instruction, nor any other permission or authority to obtain possession of client funds or securities upon our instruction. Furthermore, discretionary authority does not permit or authorize Get Rich Slowly LLC to engage in transactions involving margin leverage within client accounts without express written request by clients to utilize a leveraged portfolio strategy and conditional to our acceptance of such a request. Please reference **Item 8: Methods of Analysis, Investment Strategies, and Risk of Loss** and **Item 15: Custody**.

Clients may impose restrictions limiting the purchase or sale of certain securities or types of securities within client accounts maintained by our custodian broker-dealer Interactive Brokers LLC.

Item 17: Voting Client Securities

Get Rich Slowly LLC does not hold or accept authority to vote client securities. We do not advise clients regarding voting solicitations.

Clients will receive their proxies or other voting solicitations directly from their custodians or transfer agents.

Item 18: Financial Information

Get Rich Slowly LLC does not require or solicit pre-payment of fees six months or more in advance of providing services.

We are not subject to any financial conditions that may impair our ability to meet contractual and fiduciary commitments to our clients.

We have never been the subject of a bankruptcy petition.

Item 19: Requirements for State-Registered Advisers

Get Rich Slowly LLC is managed by:

Chief Executive Member: Bentley Makkar, MD, BSc, ChFC®, EA, Board Certified in Internal Medicine by the American Board of Internal Medicine and the National Board of Physicians and Surgeons (CRD number 7705626)

Educational background:

Bentley Makkar attained his Bachelor of Science (BSc) degree in cell biology and genetics in 2007 from the University of British Columbia in British Columbia, Canada.

Bentley Makkar attained his Doctor of Medicine (MD) degree *magna cum laude* in 2011 from St. George's University in Grenada. He subsequently completed Internal Medicine residency in 2014 at SUNY Upstate Medical University in Syracuse, NY. He is a Diplomate of the American Board of Internal Medicine (ABIM) since 2014 and a Diplomate of Internal Medicine of the National Board of Physicians and Surgeons (NBPAS) since 2023.

Bentley Makkar attained professional designation in 2023 as a Chartered Financial Consultant® (ChFC®) from the American College of Financial Service in King of Prussia, PA.

Bentley Makkar attained professional designation in 2024 as an Enrolled Agent (EA) and is admitted to practice before the Internal Revenue Service (IRS).

The Chartered Financial Consultant® (ChFC®) professional designation has been conferred since 1982 by The American College of Financial Services ("The College"), founded in 1927, upon individuals meeting the following minimum requirements: a minimum of 6000 hours of financial planning or related professional experience accrued within the preceding 5 years, successful completion of The College's ChFC® education curriculum (8 required undergraduate-level courses totaling 25 credit hours with an estimated aggregate study time between 560 to 960 hours, assessment by seven proctored closed-book exams totaling 15 hours, submission of a written comprehensive case study, and oral defense before The College's faculty), compliance at all times with The College's Code of Ethics and Procedures, and continued participation in The College's annual Professional Recertification Program (including payment of an annual recertification fee to The College, completion of a minimum of 30 hours of biennial continuing education and 1 hour of ethics continuing education, and annual recommitment to The College's Code of Ethics). Disciplines of knowledge encompassed within the ChFC® professional designation include: comprehensive personal financial planning and the personal financial planning process, insurance planning and risk management, retirement planning, income tax planning, investments, estate planning and transfer tax planning, education planning, employee benefits planning, and planning for contemporary financial challenges.

Enrolled Agents (EAs) are admitted to practice before the Internal Revenue Service (IRS). EA status is the highest professional designation awarded by the IRS. To attain professional designation as an EA, a practitioner must pass the comprehensive Special Enrollment Examination (SEE), consisting of three proctored closed-book exams administered by the Internal Revenue Service and totaling 10.5 hours. As an alternative to the SEE, certain former employees of the IRS may be granted professional designation as EAs by virtue of their past service to the IRS and technical experience. In addition, a practitioner must obtain a Preparer Tax Identification Number (PTIN), pay a fee to the IRS, and pass a tax compliance and suitability check. A practitioner must renew status as an EA every third year, necessitating annual renewal of the practitioner's PTIN, payment of a fee to the IRS, and completion of a minimum of 72 hours of triennial continuing education, including a minimum of 16 hours of annual continuing education (2 hours annually must be ethics continuing education). Disciplines of knowledge encompassed within the EA professional designation include: taxation of individuals, taxation of businesses, representation before the IRS, and IRS practices and procedures.

Business and professional background:

Bentley Makkar has actively practiced hospital medicine full time since 2014. Practice locations have included Presbyterian Hospital in Albuquerque, NM, Swedish First Hill Campus in Seattle, WA, Swedish Cherry Hill Campus in Seattle, WA, and Kaiser Permanente Central Hospital Inpatient Services (CHIPS) in Seattle, WA. Additionally, he is a Clinical Assistant Professor in the University of Washington Department of Family Medicine in Seattle, WA, and a member of clinical faculty in the Kaiser Permanente Family Medicine Residency in Seattle, WA.

Bentley Makkar is a principal of The Makkar Group of Companies since 2016. The Makkar Group of Companies is a related group of real estate investment and development corporations focused on the acquisition and development of raw land.

Bentley Makkar is Chief Executive Member and an investment adviser representative of Get Rich Slowly LLC since 2023, as detailed in this brochure and in **Part 2B of Form ADV: Brochure Supplement** for Bentley Makkar.

Get Rich Slowly LLC is not engaged in any business activities outside of its advisory business.

Get Rich Slowly LLC does not accept performance-based fees.

Get Rich Slowly LLC and its management have never been found liable in any arbitration claims alleging damages, civil proceedings, self-regulatory organization (SRO) proceedings, or administrative proceedings.

Get Rich Slowly LLC and its management have no disclosures pertaining to relationships or arrangements with issuers of securities aside from relationships or arrangements disclosed within **Item 10: Other Financial Industry Activities and Affiliations**.