Part 2A of Form ADV: Firm Brochure
Item 1 Cover Page

Left Coast Investment Strategies LLC

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This brochure provides information about the qualifications and business practices of Left Coast Investment Strategies LLC. If you have any questions about the contents of this brochure, please contact us via our website at https://www.leftcoastinvest.com.

The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority. Additional information about Left Coast Investment Strategies LLC is also available on the SEC's website at www.adviserinfo.sec.gov by searching the firm's CRD No. 317112.

Left Coast Investment Strategies LLC's registration as an investment adviser does not imply a certain level of skill or training.

Effective Date: January 2, 2025

Item 2 Material Changes

Last Annual Update: March 23, 2024

Summary of Material Changes Since Last Filing

- Correct typographical errors and improve readability throughout the document.
- Clarify our status as a commodity trade advisor.
- Expand on risks associated with futures.
- Update assets under management.
- Add foreign stamp and transaction tax as a possible fee incurred by foreign investments.
- Require a minimum initial deposit of $50,000 to manage investment accounts for you.

Delivery Requirements

We will provide a summary of any material changes to this Brochure to our clients at least annually, within 120 days of our fiscal year-end. Furthermore, we will provide our clients with an amended version at any time there is a material change.

A complete copy of our current Form ADV Part 2A and/or 2B may be accessed any time on our website at https://www.leftcoastinvest.com/disclosures.

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Item 4 Advisory Business

FIRM DESCRIPTION

Left Coast Investment Strategies LLC (hereinafter referred to as "Left Coast Investment Strategies," "Left Coast," "we," "us," or "our firm") is a Washington limited liability company with its principal office located in Seattle, Washington. The firm was founded in August 2021 and became registered as an investment adviser in December 2021. The sole Managing Member and Chief Compliance Officer of the firm is Marius Grigoriu.

As a registered investment adviser, we owe you, the client, a fiduciary duty to put the client's interest first which includes, but is not limited to, a duty of care, loyalty, obedience, and utmost good faith. Should any material conflicts of interest exist that might affect the impartiality of our investment advice, they will be disclosed to you in this Brochure.

When we provide investment advice to you regarding your retirement plan account or individual retirement account, we are fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. The way we make money creates some conflicts with your interests, so we operate under a special rule that requires us to act in your best interest and not put our interests ahead of yours.

Under this special rule's provisions, we must:

- Meet a professional standard of care when making investment recommendations (give prudent advice) to you.
- Never put our financial interests ahead of yours when making recommendations (give loyal advice).
- Avoid misleading statements about conflicts of interest, fees, and investments.
- Follow policies and procedures designed to ensure that we give advice that is in your best interest.
- Charge no more than what is reasonable for our services.
- Give you basic information about our conflicts of interest.

We urge you to review this Brochure carefully and consider our qualifications, business practices and the nature of our advisory services before becoming our client. Clients may request more current information at any time by contacting our firm.

ADVISORY PROGRAMS

Left Coast Investment Strategies provides financial planning and investment management services to our clients. In connection with our investment management services, Left Coast Investment Strategies provides advice with respect to the following asset classes: stocks, bonds, mutual funds, U.S. Treasuries, and ETFs. Under limited circumstances, we may advise on equity index futures contracts for risk management purposes under an exemption allowed by CFTC Regulation 4.14(a)(10). Our advice is generally limited to these types of investments, but we reserve the right to advise or not advise our clients on certain investments should we deem it appropriate based on their circumstances.

Left Coast's advisory services are tailored to the needs of our clients based on their individual investment objectives, risk tolerance, cash or income needs, and any investment restrictions. Although Left Coast Investment Strategies seeks to accommodate any reasonable investment restrictions or guidelines set by our clients, we may decline to accommodate certain investment restrictions that are incompatible with our firms' investment philosophy or have an adverse effect on our ability to manage your account.

Marius Grigoriu serves as Left Coast Investment Strategies' sole investment adviser representative. Clients should refer to such investment adviser representative's Form ADV Part 2B (the "Brochure Supplement") for more information about his qualifications.

Left Coast Investment Strategies enters into formal written agreements with our clients setting forth the terms and conditions under which we will provide our advisory services (the "Investment Management Agreement") or financial planning services (the "Financial Planning Agreement"). The Investment Management Agreement and Financial Planning Agreement set forth the scope of the services to be provided and the compensation we receive from the client for such services. The Investment Management Agreement and Financial Planning Agreement may be terminated by either party in writing at any time by giving thirty (30) days written notice to the other party.

Our advisors may offer all or any combination of the advisory services described below to our clients:

Investment Management. Left Coast Investment Strategies provides ongoing investment management services where client portfolios are managed according to the client's stated investment goals and objectives. Working closely with an investment adviser representative, clients will establish realistic and measurable investment goals and objectives. The investment adviser representative will recommend how clients allocate their investment portfolio among various asset classes and securities. Afterward, we will monitor and rebalance the portfolio on an ongoing basis as changes in market conditions and client circumstances occur. Left Coast does not include unmanaged or static client assets in the management fee calculation.

Left Coast Investment Strategies exercises discretionary authority over client investments. This means we manage the client's account(s) without consultation after the initial establishment of the client's investment objectives and strategy. Left Coast Investment Strategies receives discretionary authority from our clients through our Investment Management Agreement at the outset of our advisory relationship.

Left Coast manages investments valued at approximately $5.5 million as of January 2, 2025.

Financial Planning. Left Coast Investment Strategies provides financial planning services where we work with clients to review their current financial position, stated goals and objectives and make recommendations on how clients can manage their financial resources based on an analysis of their individual needs. Left Coast Investment Strategies offers comprehensive financial planning services on a fixed fee basis and ad-hoc financial consulting services for an hourly rate. Fixed fee financial planning services are provided over a one year term and renew automatically each year.

Fixed fee financial planning services may include one or more of the following:

Cash Flow Planning
Most of our financial plans incorporate information about your cash flows to ensure they are realistic considering the constraints of your income, expenses, and debt obligations. Once we understand how your cash is flowing in and out, we can help our you align your spending toward your values and goals. Online tools are available to you to analyze spending by category in search of forgotten and unneeded expenses.

Depending on your needs, we provide a wide variety of possible analysis services including, but not limited to:

- Lease vs buy analysis
- Emergency fund planning
- Home purchase vs rent analysis
- Planning for a sabbatical
- Optimizing returns on cash holdings

Debt Management
We help clients create a total debt prioritization and payoff plan, starting by helping them understand the difference and identify good debt and bad debt. Each loan gets assigned an action classification such as minimum payments only, pay as scheduled, refinance, or accelerated payoff.

We also help clients analyze new loans they are about to take on such as home mortgages, home equity lines of credit, auto loans, intra-family loans, and more.

Education Planning
Together with clients, we help quantify the cost of education for them or their children. Armed with that knowledge we develop strategies for how to fund the education, including how much should be saved or borrowed, which tax-efficient vehicles to use, and how an investment portfolio geared toward education should be constructed.

Tax Planning
When tax planning, we look for opportunities to reduce client tax bills by reviewing client-reported income and losses, investment results, and changes to status. We also take into account upcoming changes to tax policy. Advice given in this area tends to be broad, such as:

- Roth conversion analysis
- Looking for capital gains and tax loss harvesting opportunities
- Stock option planning

We do not give specific tax advice, such as whether certain expenses can be deducted, nor do we prepare tax returns, make recommendations about quarterly estimated tax payments, advise on payment plans, or represent the client in an audit. However, we are able to support and coordinate with tax professionals who can assist with specialized topics.

Insurance Analysis
By evaluating cash flow requirements, we can run a variety of what-if scenarios where income is interrupted due to variety of insurable events. This shows us whether clients have insurance coverage gaps. Once a gap is identified, clients can work with an insurance professional to shop for an appropriate policy.

Estate Plan Review
In many cases, clients don't have or can't find various documents that are part of an estate plan. We encourage clients to review plans and account titles for common mistakes. We can project the impact of taxes on estate plans and visualize the flow of inheritance to heirs to help clients look for opportunities to make improvements.

Aggregate Asset Allocation & Asset Location Planning
We help clients think through how much to invest in broad categories investment categories like stocks and bonds. We also recommend which investment account types to use for each investment. Considerations include client risk needs, risk tolerance, liquidity needs, and investment experience.

Financial Independence / Retirement Planning
Helping clients find a path to retirement or financial independence is one of our most requested services. Because retirement looks different to everyone, we spend time with you to get a sense of the lifestyle you wish to achieve in retirement.

We start by building a cash flow model of your situation including all income, expenses, assets, and goals. Investment accounts are analyzed to estimate expected returns and volality. All this data goes into a simulation, which we run thousands of times, to forecast how likely you'll achieve all of your goals.

With a model in place, we turn to asking what-if questions, perform stress tests, and tune parameters to maximize your chances of success.

Financial planning is a highly collaborate process as we cannot make up the inputs to the model on our own. The value you receive from this activity will be proportional to the effort you put into working with us.

Daily Updated Net Worth Tracking & Progress Monitoring
Clients will have access to online tools to monitor account balances, calculate daily net worth, categorize expenses, set and track budgets, and run what-if analyses. Clients unlock modules based on their interest levels for self-service after having received training from the adviser.

Ad-hoc Consulting
Ad-hoc financial consulting services may include, but is not limited to, providing a second opinion on a plan created by another adviser or providing analysis on a requested investment topic or

security. Recommendations may be in the form of a written financial plan or a verbal consultation based on the type of engagement.

Clients are under no obligation to act upon the firm’s or associated person’s recommendation. If clients elect to act on any of our recommendations, clients are under no obligation to affect their transactions through our firm and may elect to purchase investment products we recommend through other brokers or agents that are not affiliated with Left Coast or our investment adviser representative.

Wrap Fee Program. Left Coast does not participate in any wrap fee programs.

Important Note: It is the client’s responsibility to ensure that Left Coast Investment Strategies is promptly notified if there are ever any significant changes to their financial situation, goals, objectives, or needs so we can review our previous recommendations and make any necessary adjustments.

Item 5 Fees and Compensation

ADVISORY FEES

The following information describes how Left Coast Investment Strategies is compensated for the investment advisory services we provide to our clients. The specific way fees are charged and the compensation we receive may differ between clients depending upon the individual Investment Management Agreement or Financial Planning Agreement with each client. Advisory and planning fees will not be higher than the fees disclosed in the Brochure.

Left Coast Investment Strategies reserves the right to negotiate our compensation with clients depending on the scope of our advisory relationship, and we may charge higher or lower fees than are available from other firms for comparable services. Left Coast Investment Strategies partially offsets financial planning fees for clients who are also investment management clients due to partial overlap in activities between the two services and our ability to achieve economies when bundling the services together.

Investment Management Fees: In consideration for providing investment management services and in accordance with the Investment Management Agreement with the client, Left Coast Investment Strategies charge an annualized asset-based fee that does not exceed 1.50% based on the client’s assets under management (“AUM”) as valued by the qualified custodian, Interactive Brokers, LLC (“Interactive Brokers”). Left Coast Investment Strategies’ AUM Fees are negotioable based on the size, complexity, and expected returns of client accounts.

An example of the formula to calculate the Invesment Management Fee is listed below:

Step 1. $\frac{\text{([Annualized Percentage] x \$[Previous Day's Assets Under Management])}}{\text{[Number of Trading Days Per Year]}}$ = $[Previous Day’s Fee]

Step 2. [Add the Daily Fees for Each Trade Day of the Month] = $ [Monthly Payment]

Please see an example of the formula for calculating the Investment Management Fee(s) over a four-trade day period below:

Step 1		
Day 1	(.01 x $100,000) / 252 =	$3.96
Day 2	(.01 x $100,500) / 252 =	$3.99
Day 3	(.01 x $100,700) / 252 =	$4.00
Day 4	(.01 x $100,600) / 252 =	$3.99
Step 2		
Total Fee for Billing Period	$3.96 + $3.99 + $4.00 + $3.99=	$15.94

KEY	
Annualized percentage	= 1% (.01)
Assets Under Management	= $100,000
Number of Trading Days Per Year	= 252

Left Coast Investment Strategies bills our investment management fees on a monthly basis in arrears. The monthly fees will be based upon the daily fees for each trade day of the billing period the account was open. Left Coast Investment Strategies does not withdraw fees directly from clients' accounts. Clients authorize the calculation and deduction of our fees from their managed accounts by the qualified custodian, Interactive Brokers. We will instruct the qualified custodian to send clients invoices detailing the advisory fees automatically calculated and deducted from their accounts when those fees are actually charged. In all instances, the Adviser will instruct the qualified custodian, Interactive Brokers, to send invoices, including the fee, the formula used to calculate the fee, the time period covered by the fee, the name of the custodian, and the amount of assets under management on which the fee was based. In the event another broker-dealer is used, the Adviser will deliver the invoice with the noted information as required. The qualified custodian will send these to the client concurrent with the request for payment or payment of the Adviser's advisory fees. If the client accounts are with Interactive Brokers, clients cannot aggregate household accounts to receive a lower tiered schedule fee. Aggregation is a common method of fee calculation and by not having fee aggregation, the client may pay a higher fee.

No fee structure is free of all conflicts of interest. AUM fees incentivize us to limit trading, maximize growth, and accumulate wealth in accounts managed by Left Coast. Often, this is good for clients as it can limit transaction costs and align incentives. Sometimes, this presents a conflict of interest which we mitigate by taking our status as a fiduciary seriously and operate under a written code of ethics.

Financial Planning Fees: In consideration for providing financial planning services and pursuant to the financial planning agreement, our firm charges an annual fixed fee ranging from $1,800 to $9,600, billed on a monthly basis at a rate of $150 to $800 per month. Left Coast Investment Strategies will offer a no-obligation initial consultation to determine the complexity, scope, and proposed fee for the financial planning engagement. All financial planning fees are negotiable.

The first monthly invoice will be due one month into our engagment. Invoices include a summary of services provided. The corresponding fees are due to the Adviser within thirty (30) days of the invoice date. In general, if no service is provided to the client, no fees will be charged. The monthly fee will be offset for related advisory services of assets being manageed by the Adviser. Payment for may be accepted through AdvicePay or as a deduction from their managed investment account. At the end of each billing year, clients may continue to work with us or give us notice of cancellation.

Limited scope financial planning engagements, including but not limited to reviewing outside financial plans can be available based on an hourly fee. The hourly fee will be invoiced upon completion of services.

Additional Fees and Expenses: Clients will incur transaction charges and/or brokerage fees when purchasing or selling securities. These charges and fees are typically imposed by the broker-dealer or qualified custodian through which account transactions are executed. Some foreign investments may incur stamp tax or transaction fees. For more information on our brokerage practices, please refer to Item 12 (Brokerage Practices) of this Brochure.

The fees that clients pay to our firm for investment advisory services are separate and distinct from the fees and expenses charged by mutual funds and/or exchange-traded funds (described in each fund's prospectus) to their shareholders. The fees charged directly by mutual funds and exchange-traded funds will typically include a management fee and other fund expenses.

To fully understand the total costs associated with their investment portfolio, clients should review all the fees charged by mutual funds, exchange-traded funds, our firm, and others.

Termination: All agreements with our clients may be terminated by either party at any time upon thirty (30) days written notice. Upon termination of a Financial Planning Agreement, Left Coast will generate a final report with the financial plan at the time of termination. Clients are advised to not act on the report because the information contained may be incomplete. Upon termination of our status as the client's investment adviser, Left Coast Investment Strategies will not take any further action with respect to the client's account(s). Clients will be responsible for instructing their custodian and monitoring their account for the final disposition of assets.

If a client does not receive Left Coast Investment Strategies' Part 2A and Part 2B Brochure at least 48 hours prior to entering into an investment advisory agreement, the advisory client has a right to terminate the contract without penalty within five business days after entering the contract.

Upon receipt of a proper notice of termination from the client, as described in the Investment Management Agreement or Financial Planning Agreement, any earned unpaid fees will be billed on a pro-rata basis based on the amount of work performed by us up to the point of termination.

Brokerage Commissions: Left Coast Investment Strategies does not receive brokerage commissions from the sale of securities or other investment products. Our compensation for recommending securities and investment products is limited to the advisory fees described above.

Any material conflicts of interest between clients and Left Coast Investment Strategies or our employees are disclosed in this Brochure. If at any time, additional material conflicts of interest develop, Left Coast Investment Strategies will provide our clients with written notification of those material conflicts of interest or an updated Brochure.

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

PERFORMANCE-BASED FEES

Left Coast Investment Strategies does not charge our clients fees based on a share of capital gains or capital appreciation of the assets in their accounts, and therefore, we do not engage in side-by-side management.

Item 7 Types of Clients

TYPES OF CLIENTS

Left Coast Investment Strategies offers investment advisory services to individuals and high net worth individuals. Client relationships may vary in scope and length of service.

ACCOUNT REQUIREMENTS

Left Coast Investment Strategies requires a minimum initial deposit of $50,000 and maintaned account balance of $15,000 in order to retain our investment management services.

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

METHODS OF ANALYSIS

The methods of analysis Left Coast Investment Strategies uses in formulating investment advice and/or managing client assets includes but is not limited to:

Fundamental Research: Analysis of industries and companies based on business factors such as assets, sales, earnings, products and services, markets, and management. We use fundamental research to identify investments with higher or lower investment returns and higher or lower risk. Investments selected with fundamental analysis may take a long time to perform favorably or not at all. Adverse events may invalidate the original thesis for the inclusion of a stock in a portfolio.

Our investment research is drawn from quarterly filings, annual regulatory reports, third party data providers, as well as from economists and other industry professionals. Our methods rely on the assumption that the companies whose securities we purchase and sell, the rating agencies that review these securities, and other publicly available sources of information about these securities, are providing accurate and unbiased data. While we are alert to indications that data may be incorrect, there is always a risk that our analysis may be compromised by inaccurate or misleading information.

Technical Analysis: Technical analysis maintains that stock price data can be used to identify stocks with higher or lower expected returns because all available information is already reflected in the stock price and its movements. Generally, technical analysis employs models and trading rules based on price and volume transformations, such as momentum, moving averages, regressions, inter-market, and intra-market price correlations. While there has been strong empirical evidence supporting momentum, strategies may stop working in the future or go dormant for an extended period. Technical analysis operates in aggregate; any individual stock may experience unfavorable performance.

Quantitative Analysis: Numerical, rules-based analysis to identify fundamental and technical characteristics. Quantitative analysis offers protection from human bias; it may not catch all factors that influence the performance of a stock. Quantitative analysis is backward looking in nature and may be based on assumptions that prove to be incorrect. Our methods of analysis are primarily quantitative in nature.

Academic and Practitioner Research: We frequently read pre-print and published studies that to inform and update our investment process. We look for empirical evidence and theoretical models that explain the performance of the strategies we use and to identify new ones. From this research, we develop criteria to determine which clients may be a good match, operational procedures, and automation.

INVESTMENT STRATEGIES

Due to the highly competitive nature of markets and the low predictability of future events, most investors are best served with a combination of low-cost stocks, bonds, and cash that are broadly diversified. In fact, the average investor should construct a portfolio that consists of one of each investment in quantities that are equal to the proportion of each investment to the total market. We call this a capitalization weighted total market portfolio. Many funds offer this at low cost.

Any approach that is ideal for the average investor, by definition, ignores the goals, preferences, tastes, and sensitivities to risk that are specific to any individual. As we get to know you better, we're able to recommend a portfolio that tilts away from the total market portfolio in ways that are beneficial to you.

Over time, researchers found several investment styles, commonly called factors, that drive higher investment performance and sometimes lower volatility. Many factors have been proposed in research literature, but we prefer the ones that have measurable outcomes with the following criteria:

- Persistent throughout long time horizons
- Common across many asset-classes
- Robust to variation in definition
- Survive transaction costs
- Are predicted by a theoretical model that improves our understanding of how markets work

Such factors allow us to make better risk-return tradeoffs that are customized to your specific needs. Combining investment styles allow us to tap into multiple sources of returns that stack while diversifying across risks more efficiently. This gives us the ability to add value to your portfolio, not in the form *alpha* (returns that cannot be explained by a model), but in terms of intelligently tapping into to multiple sources of risk and return that you can stick through when times get tough.

Right-Sizing Investments: Research and common sense agree that any investment with uncertain outcomes should be scaled upward with our expectations for returns, downward with the degree of uncertainty, and right-sized according to individual risk aversion. We use the Constant Relative Risk Aversion (CRRA) model to measure every client's risk aversion and calculate how much to invest in each asset class based on our expectations of returns and volatility. We cross check and potentially override allocation recommendations derived by this model with the need to take risk to achieve your stated life goals.

Low Volatility: The CRRA model scales up the size of our investment linearly with expected returns, but it scales our investments down by the square of volatility. This means volatility has a much heavier emphasis on right-sizing investments than does our expectations for returns. High volatility investments tend to have lottery-like returns. While many people find such investments desirable, empirical evidence suggests they underperform. Our portfolios tend to be composed of lower volatility investments. A portfolio of lower volatility investments usually outperforms in down markets but can lag for extended periods of time in strong bull markets.

Value: All other things being equal, investments acquired at a low price compared to their profitability / quality are expected to offer higher returns to investors than their higher-priced or lower-quality counterparts. Often, these investments are unpopular for a variety of reasons. When these reasons are based on risk or investor tastes, these investments may outperform the average portfolio over the long run. Investors might find it hard to invest in value due to the social pressure of holding an unpopular portfolio, permanent impairment of value, and long streaks of underperformance.

Momentum: Momentum is the tendency for investments to continue appreciating or depreciating in value for some time before eventually reversing. Sometimes this may be due to investors initially underestimating the impact of new developments followed by eventual overreaction. Other times, it may be due to positive feedback loops that run for a while before an external impulse breaks the cycle. We use cross-sectional momentum to identify which investments exhibit more strength than others and time-series momentum, also known as trend following, to reduce volatility during difficult markets and crises, such as bear markets, high inflation, and deflation. Both forms of momentum risk long streaks of underperformance compared to the average portfolio. Cross-sectional momentum may do poorly when markets turn from a bottom. Time series momentum risks a long series of small losses, which can be psychologically difficult to withstand. Momentum strategies tend to have higher turnover and lower cost efficiency.

Concentration and Diversification: Diversification is the practice of spreading one's investments across multiple sources of risk to reduce overall risk to the portfolio. Most commonly, this is done by buying as many stocks as possible. Or buying multiple asset classes. Our approach to diversification is a bit different. We focus primarily on diversifying across *unique sources of risk*, which include the risks present in Value and Momentum strategies. Each of these risks often kick in at different times, which means they tend to play well together. Capturing those risk factors requires excluding many investments from the total market portfolio, which looks like a concentrated portfolio when simply counting the number of assets in the portfolio. However, we believe this ultimately gives us better diversification because we unlock additional sources of risk that we would otherwise be unable to tap.

Customized for our Clients: This is the primary basis for how we provide value to you on top of our fees. All investments, even the seemingly low-risk ones, carry risk. To maximize your returns, we need to match you to appropriate styles and levels of risk. As we get to know you and how you respond, we adjust the portfolio to become a better match.

Human Bias & Simplicity: Studies indicate that humans have investment biases, which result in predictable errors and underperformance. Our approach minimizes subjective decision making to keep such risks in check. We also prefer to use simple, transparent models that can be understood. Portfolios composed of individual stocks are built with the assistance of proprietary software that scans the universe of stocks for criteria that match the styles described above. This introduces repeatability into our process and greatly reduces the potential for investing biases. Risks include errors due to bugs, bad data, and research that is no longer relevant. We take measures to mitigate these risks by updating our software, reviewing data, and following up on new research.

Tax Awareness: Taxes are one of the largest expenses for investors. We keep taxes in mind when executing trades, looking for opportunities to reduce portfolio turnover, harvest losses for tax purposes, and take advantage of tax-advantaged accounts like IRA and Roth accounts. Some investment styles are less tax efficient by nature, but that's an informed tradeoff. We believe that being single minded in avoiding taxes at all costs can be a mistake.

RISK OF LOSS

Investing in securities involves certain investment risks. Securities may fluctuate in value both upwards and downwards. As part of its advisory services, Left Coast Investment Strategies will help clients in determining the appropriate level of risk that they can tolerate. However, investing in securities involves risk, clients should be prepared to bear potential losses, and there are no guarantees that an investment strategy will meet client goals. There is no guarantee that any of the investment strategies that our firm employs will outperform the investment strategies used by other firms. Past performance is no guarantee of future results.

For each client, we will review the client's investment goals, financial position, investment time horizon, risk tolerance, and other factors to develop an investment strategy appropriate for the client's needs. Client participation in this process is essential. This includes full and accurate disclosure by the client of information requested by Left Coast Investment Strategies. Left Coast Investment Strategies will rely on the financial and other, information provided by the client or their designees without duty or obligation to validate the accuracy and completeness of the information provided. It is the responsibility of the client to inform Left Coast Investment

Strategies of any changes in their financial condition, goals or other factors that may affect this analysis.

The investment risks described below may not be all inclusive but should be considered carefully:

Equities Risk: Equity securities can decline in value over short or extended periods because of changes in a company's financial condition and in overall market, economic and political conditions.

Interest Rate Risk: U.S. Treasury securities provide a steady stream of income; however, these securities' prices would still fluctuate with changes in interest rates. When interest rates rise, bond prices fall; and when interest rates fall, bond prices rise. Additionally, longer maturity bond prices are more sensitive to interest rate movements than those of the bonds with shorter maturities. The exception to this is U.S. Treasury floating rate note (FRN), for which the price tends to increase in a rising interest environment as coupon payments reset at the prevailing higher rates.

Market Risk: Market Risk is the risk that various factors may affect security prices, including but not limited to monetary & fiscal policies, political developments, natural disasters, wars, and terrorist attacks.

International Investment Risk: Our firm may invest in securities of U.S. companies operating internationally, as well as international companies on both domestic and foreign exchanges. Businesses operating in other countries are subject to political and economic risks that are not present in the U.S. Stock markets outside of the U.S. may be more volatile. In some international markets, U.S. shareholders may not be able to exercise the same legal rights as foreign shareholders. There may be more limited access to information about international companies.

Currency Risk: Some investments may include the currencies of foreign countries. The value of the assets measured in the portfolio's base currency will be affected by changes in currency exchange rates, which could affect a portfolio's performance independent of the performance of its securities investments. A portfolio may seek to hedge all or any portion of its foreign currency exposure. However, even if a portfolio includes said hedging, it is not possible to hedge fully against currency fluctuations. The value of securities invested in non-base currencies may fluctuate due to independent factors not related to currency fluctuations. Currency exchange rates can fluctuate significantly over short periods of time causing, along with other factors, a portfolio's asset value to fluctuate as well. If a substantial portion of a portfolio's total assets is designated in the currencies of specific countries, the portfolio will be more susceptible to the risk of adverse economic and political developments within those countries.

Exchange Traded Funds: Exchange-traded funds ("ETFs") are a type of index fund bought and sold on a securities exchange. The risks of owning an ETF generally reflect the risks of owning the underlying securities they are designed to track, although lack of liquidity in an ETF could result in it being more volatile. ETFs have management fees that increase their costs. ETFs are also subject to other risks, including: (i) the risk that their prices may not correlate perfectly with changes in the underlying index; and (ii) the risk of possible trading halts due to market conditions or other reasons that, in the view of the exchange upon which an ETF trades, would make trading in the ETF inadvisable. Our firm may invest in ETFs with underlying securities in equity, fixed income (short and long duration), options, and foreign currencies. Some of the risks associated with these securities have been noted above. In addition, the firm may invest in ETFs having commodities and precious metals, or futures of these, as underlying securities. Risks with these assets are described in more detail below.

Liquidity Risk: Liquidity is the ability to convert an investment into cash. Investment assets are usually more liquid when established markets exist to trade those securities. For instance, U.S. Treasury bills and most equity securities have highly developed markets, while tangible property, such as real estate and precious stones, are less liquid. In case of extreme market activity, we may be unable to liquidate investments in thinly traded and relatively illiquid securities promptly if necessary. Also, sales of thinly traded securities could depress the market value of those securities and reduce the investments' profitability or increase its losses.

Financial Risk: Excessive use of credit (borrowing) to finance a business' operations increases the risk of profitability, because the company must cover its debt obligations in good and bad years.

Risks Specific to Options Trading: Trading options is highly speculative in nature and involves a high degree of risk. Options may involve certain costs and risks such as liquidity, interest rate, market, and the risk that a position could not be closed when most favorable. Option contracts are traded for a specified period and have no value after expiration. When trading options, there is a risk that the account may lose the total amount of the premium paid (when long options) or more than the total amount of premium received (when short options). Trading halts in the underlying security or other trading conditions (for example, volatility, liquidity, systems failures) may cause the trading market for an option (or all options) to be unavailable, in which case the holder or writer of an option would not be able to engage in a closing transaction and an option writer would remain obligated until expiration or assignment. Even if the market is available, there may be situations when options prices will not maintain their customary or anticipated relationships to the prices of the underlying interests and related interests. Disruptions in the markets for the underlying interests could also result in losses for options investors. This is not intended to be an exhaustive presentation of all risks associated with trading options and clients should review the current Options Clearing Corporation ("OCC") disclosure document "Characteristics and Risks of Standardized Options" and any options risk disclosures provided by the broker-dealer used for client trades.

Futures, Hedging, and Trend Following Risk: Depending on the investment strategies selected for your account, we may use futures to hedge price movements during downward market trends. The use of futures allows us to maintain exposure to the underlying stocks, giving us tax advantages and potentially higher expected returns by maintaining continuous exposure to Value and Momentum factors. The futures we use are very liquid and cheap to transact, allowing us to hedge quickly and at minimal cost to you. No hedge is perfect. Futures positions are likely to result in a loss unless markets experience extended declines. Futures-based hedging may fail on days when futures prices move in the opposite direction of the stock portfolio. There may be situations when futures prices will not maintain their customary or anticipated relationships to the prices of the underlying interests and related interests. There may also be situations where futures prices correctly track their index, but where the index and your portfolio diverge. Brokers may automatically liquidate futures positions if the divergence of price movement moves too far, which can further reduce the effectiveness of the hedge.

Business Risks: The companies identified for investment face a wide variety of operational risks, including competitive threats, regulatory changes, execution challenges, and responses to external changes. For businesses listed on US exchanges, the Securities and Exchange Commission requires companies to disclose the most significant risk factors that could impact the business. However, these disclosures could be incomplete or inaccurate. An assessment of the relevant risk factors for any business could be incomplete or inaccurate. Both unforeseen and known risk factors may transpire, resulting in a deterioration of corporate performance.

Fundamental Analysis Risk: Forecasting financial performance is an inexact process of estimation that relies on the accuracy of financial and industry data provided by companies and third parties. This data may contain material errors or omissions. Investing based on fundamental research may also result in errors of judgment or analysis. Investment performance may suffer if the assessment of a business or its prospects is incorrect, and even a correct analysis could result in a loss of capital.

Technical Analysis Risk: Trading based on charting and technical analysis possess the risk that the charts may not accurately predict future price movements. Current prices of securities may reflect all information known about the security and day to day changes in market prices of securities may follow random patterns and may not be predictable with any reliable degree of accuracy.

Qualitative Analysis Risk: While the IAR utilizes his investment expertise and experience to make correct determinations based on markets and industry themes and/or cycles, the financial market is not an exact science. Thus, typical themes or cycles may experience deviation that could result in losses in capital.

Interim Underperformance: The long-term and concentrated nature of our strategy means that even if the strategy is “working properly” and the analysis is correct and leads to profitable realized outcomes, clients may experience multi-year periods of significant underperformance relative to market indexes and other investment strategies. This interim underperformance poses a significant risk of permanent capital loss for clients with short time horizons or who require withdrawals from their account.

Systemic Risk: Our firm relies on the stability of the overall financial system to implement its investment strategy. The security of client assets depends on the solvency of a third-party custodian and brokerage firm, upon which our firm also relies for prime brokerage and trading services. In the event of a disruption to the custodian’s business or the overall functioning of securities markets, our firm may be unable to implement its investment strategy and clients may experience a significant or complete loss of their capital.

Strategy: Our firm cannot guarantee that its strategy will be always implemented, or in full. Our firm has full discretion and a broad mandate, and it may make investments not in keeping with the general description provided in this Brochure. There can be no guarantee that suitable investment opportunities will be always available.

Management: Our firm is dependent on the services of its Managing Member. If he were incapacitated or otherwise unable to continue providing services, our firm would not be able to continue to implement its strategy and clients could experience a significant loss of capital.

Frequent Trading: Although many of the firm's investments are long-term in nature, any capital gains due to positions held for less than one year may be taxable at a higher rate. Frequent trading could result in lower returns due to these costs.

Technology Risk: Errors may occur in designing, writing, testing, and/or monitoring quantitative models built on computer programming. Inadvertent data and computer system errors are an inherent risk of computer-generated models, and the complexity of models may make it difficult or impossible to detect the source of any weakness or failure in the models before material losses are incurred. In addition, the complexity of the models and their reliance on complex computer programming may make it difficult to obtain outside support. Finally, in the event of any software or hardware malfunction, or problem caused by a defect or virus, there may be sub-optimal results from those quantitative models.

Public Health Crisis Risks: A public health crisis, pandemic, epidemic, or outbreak of a contagious disease, such as the recent outbreak of Coronavirus (or COVID-19) could have an adverse impact on global, national, and local economies, which in turn could negatively impact our investments and strategies. Disruptions to commercial activity resulting from the imposition of quarantines, travel restrictions or other measures, or a failure of containment efforts, may adversely affect our investments in various ways, including but not limited to, decreased demand, supply chain delays, disruptions or staffing shortages. The outbreak of Coronavirus has contributed to, and may continue to contribute to, volatility in financial markets, including market liquidity and changes in interest rates. A continued outbreak may have a material and adverse impact on our investment returns. The impact of a public health crisis such as the Coronavirus (or any future pandemic, epidemic, or outbreak of a contagious disease) is difficult to predict, which presents material uncertainty and risk with respect to the performance of our investments and strategies.

Omission of Risks. This Brochure does not provide a comprehensive list of every possible source of risk. Every potential outcome of an investment cannot be predicted, and it cannot disclose every potential risk factor for every investment to clients. The value of securities that our firm invests in may go up or down in response to factors not within our firm's control, including but not limited to the status of an individual company underlying a security, or the general economic climate. Clients may suffer losses for any reason or no discernible reason.

Investors should be aware their investment is not guaranteed and understand that there is a risk of loss of value in their investment.

Item 9 Disciplinary Information

REQUIRED DISCLOSURES

Left Coast Investment Strategies is required to disclose all material facts regarding any legal or disciplinary events that would materially impact a client's evaluation of Left Coast Investment Strategies or its management or the integrity of Left Coast Investment Strategies' management. No such disciplinary events have occurred at Left Coast Investment Strategies or have been brought against Marius Grigoriu, Left Coast Investment Strategies' sole member, as of the date of this Brochure.

Item 10 Other Financial Industry Activities and Affiliations

OUTSIDE BUSINESS ACTIVITIES

When we trade equity index futures to manage the risk of a portfolio, we may be engaging with you as a Commodity Trading Advisor. We may go one or more years without placing any futures trades, depending on market conditions. We do not hold ourselves out as being in the business of trading commodities, and we are exempt from registration with the National Futures Association.

Neither Left Coast Investment Strategies, nor any of its employees are registered or have an application pending to register as a broker-dealer or registered representative of a broker-dealer, futures commission merchant, commodity pool operator, a commodity trading advisor, or an associated person of the foregoing entities.

Mr. Grigoriu, Managing Member of our firm, in his personal capacity, serves as a Broker at Columbia Partners Real Estate located in Seattle, WA. In this position, he identifies suitable residential and investment real estate, negotiates deals, and manages transactions. He typically spends 8 hours per month in this position. Left Coast Investment Strategies does not receive any commissions or compensation from Mr. Grigoriu's work in this position.

Mr. Grigoriu also serves as a Senior Engineering Manager at Smartsheet Inc. located in Bellevue, WA. In this position, he leads a team of software engineers building new features for Smartsheet. He spends approximately 160 hours per month in this position. Left Coast Investment Strategies does not receive any commissions or compensation from Mr. Grigoriu's work in this position.

As a result, Mr. Grigoriu's outside roles may present a potential conflict of interest with him conducting other business activities during market trading hours. Left Coast will limit the number of clients we serve in effort to avoid this potential conflict of interest and deliver a high quality of service.

AFFILIATED ENTITIES

Left Coast Investment Strategies does not have any relationships or arrangements with affiliated entities that create a material conflict of interest with our clients.

OTHER INVESTMENT ADVISERS

Left Coast Investment Strategies does not have any business relationships with other investment advisers that create a material conflict of interest for our clients.

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

CODE OF ETHICS

Left Coast Investment Strategies LLC has adopted a Code of Ethics (the “Code”) that sets forth a standard of business conduct for our firm and all our associated persons. The purpose of the Code is to set out ideals for integrity, objectivity, competence, fairness, confidentiality, professionalism, and diligence for our firm and our associated persons to espouse in the interest of our clients and investor protection. The Code includes provisions relating to the confidentiality of client information, a prohibition on insider trading, restrictions on the acceptance of significant gifts and the reporting of certain gifts and business entertainment items, and personal securities trading procedures, among other things. All employees of Left Coast Investment Strategies are required to handle their personal securities transactions in such a manner as to avoid any actual or potential conflicts of interest or any abuse of position of trust and responsibility. Annually, we require all employees to certify that they have read, understand, and will comply with the Code.

Clients and prospective clients may request a full copy of our firm’s Code of Ethics by contacting our firm via our website at https://www.leftcoastinvest.com.

PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS

Left Coast Investment Strategies and/or our investment adviser represenatatives may invest in the same securities that are recommended to and/or purchased for our clients. Left Coast Investment Strategies and/or our investment adviser representative does not recommend securities to our clients in which Left Coast Investment Strategies and/or our investment adviser representative has a material financial interest. Left Coast Investment Strategies has adopted procedures designed to assure that the personal securities transactions, activities and interests of Left Coast Investment Strategies and/or our investment adviser representative will not interfere with our ability to make investment decisions in the best interest of our clients, which includes, but is not limited to, a duty of care, loyalty, obedience, and utmost good faith.

PERSONAL TRADING

Left Coast Investment Strategies maintains and enforces written policies and procedures reasonably designed to prevent the misuse of material non-public information by our firm or any access persons of our firm with regards to their personal securities transactions. Personnel and related persons of Left Coast Invetment Strategies will not trade ahead of clients or engage in frontrunning activities. Personal trading activities are continually monitored to reasonably prevent conflicts of interest between our firm and our clients.

Item 12 Brokerage Practices

SELECTION OF BROKER-DEALERS

Securities transactions are generally executed through Interactive Brokers, member FINRA/SIPC/NYSE. Interactive Brokers maintains custody of our clients' assets and effects securities transactions for our investment management clients' accounts. Left Coast Investment Strategies is independently owned and operated and is not affiliated with or a related person of Interactive Brokers.

Left Coast Investment Strategies considers several factors prior to recommending a particular broker-dealer to our clients, including but not limited to, their familiarity with the securities to be sold or purchased, their execution skills, order-flow capabilities, their commission rates or other fee schedules, their custodial services, their level of net capital (financial strength) and excess SIPC and other insurance coverage. The commissions charged by Interactive Brokers are competitive with similarly situated retail broker-dealers offering the same variety of securities to clients. Clients are advised, however, that they may be able to effect transactions in securities through other broker-dealers at lower commission rates, particularly with respect to securities listed on a national securities exchange or in the over-the-counter market.

Research and Other Soft Dollar Benefits. Left Coast Investment Strategies does not have a formal arrangement for soft-dollar benefits with Interactive Brokers. Left Coast Investment Strategies does not participate in any commission-sharing arrangements or receive soft dollar credits. However, Interactive Brokers does provide Left Coast Investment Strategies personnel soft-dollar benefits such as research products and tools. While the benefits we receive from Interactive Brokers do not depend on the amount of brokerage transactions directed to Interactive Brokers, as a fiduciary, we are required to disclose that there is an inherent conflict of interest when our firm recommends that clients maintain their assets at Interactive Brokers. These recommendations may be based in part on the benefits we receive from Interactive Brokers, such as the availability of the above-mentioned products and services, and not solely on our clients' interest in receiving most favorable execution. Nonetheless, we seek to ensure that the securities transactions effected for our clients represent the best qualitative execution, not just the lowest possible cost. If the client prefers Left Coast Investment Strategies to utilize another broker-dealer instead of Interactive Brokers, the Adviser may receive access to research products and tools from the other brokerage firm.

Our firm routinely compares order execution disclosure information at Interactive Brokers to other broker-dealers to ensure that Interactive Brokers remains competitive in providing best execution for our clients' securities transactions. Although the brokerage commissions and/or transaction fees charged by Interactive Brokers may be higher or lower than those charged by other broker-dealers, in seeking best execution for our clients our firm strives to ensure that our clients pay brokerage commissions and/or transactions fees which we have determined, in good faith, to be reasonable in relation to the value of the brokerage and other services provided by Interactive Brokers.

Brokerage for Client Referrals. Left Coast Investment Strategies does not consider broker-dealer or third-party referrals in selecting or recommending broker-dealers to our clients as this would create a conflict of interest. Left Coast or any related persons do not receive client referrals from a broker-dealer or third party.

Directed Brokerage. While Left Coast Investment Strategies generally recommends that clients direct transactions through certain broker-dealers, we do not have discretionary authority to determine the broker-dealer to be used for the purchase or sale of securities for client accounts or the commission rates paid to a broker-dealer for client securities transactions.

In rare cases, Left Coast Investment Strategies may utilize other broker-dealers when requested by the client. Clients of Left Coast Investment Strategies must be aware that if they direct us to use a particular broker-dealer that it may limit our ability to achieve best execution or limit their participation in block trading. As a result, clients may pay higher commissions, have higher transaction costs, or receive less favorable prices. In situations where the client directs us to affect their transactions through a particular broker- dealer, we require such directions to be in writing.

TRADE AGGREGATION

Investment decisions deemed appropriate for one client may also be deemed appropriate for other clients so that the same security may be purchased or sold at or about the same time for more than one client. When this is the case, our firm may, but is not obligated to, aggregate similar trades for multiple clients and execute the trade as a single block.

When transactions are so aggregated, the securities purchased or sold will be allocated consistent with the Adviser's fiduciary duty. Our trade allocation procedures seek to allocate investment opportunities among our clients in the fairest possible way considering their best interests. These procedures ensure that allocations do not involve a practice of favoring or discriminating against any client or group of clients. Transactions are usually aggregated to seek a more advantageous net price and/or to obtain better execution for all clients. Nevertheless, there is no assurance that the aggregation of transactions will benefit all clients equally, and in some instances combined orders could adversely affect the price or volume of a security. Also, it is possible that we may not aggregate trades in circumstances where it would be beneficial to do so. Orders, which are not aggregated, are entered at the market prices prevailing at the time of the transaction. Accordingly, trades that are not aggregated and entered at different times during the same day may result in different pricing, where the client may incur higher transaction costs if not aggregated.

TRADE ERRORS

From time to time, our firm may make a trade error when servicing a client's account. When this occurs, we will correct the trade as soon as we discover the error. Trading errors will be corrected at no cost to clients. If there is a cost associated with this correction, such cost is borne by Left

Coast Investment Strategies and not the client. Note that we do not credit accounts for market losses unrelated to our error.

Item 13 Review of Accounts

ACCOUNT REVIEWS

Marius Grigoriu, Managing Member and Chief Compliance Officer of Left Coast Investment Strategies, conducts account reviews of client investment portfolios at least quarterly. The frequency of the review depends upon a variety of factors such as the client's risk profile, activity in the account, economic and market conditions, and the client's preferences if any. Additional reviews may be triggered by changes in the investment objectives or guidelines for a particular client or specific arrangements with the client.

Formal client review meetings are generally conducted on a regular basis at intervals mutually agreed upon by the advisor and the client, but no less than annually. During these reviews, any changes in the client's investment objectives are discussed so we can review our previous recommendations and make any necessary adjustments.

ACCOUNT REPORTS

Those clients to whom Left Coast Investment Strategies provides investment management services receive reports from our qualified custodian summarizing their account(s) and investment results. Reports may be furnished in writing or electronically as requested by the client. Clients are urged to compare the account statements they receive from their custodian to any written reports received from our firm and promptly notify us of any discrepancies.

Clients have direct and continuous access to their account information and related documents via the password-protected website of the qualified custodian with which their accounts are held.

Item 14 Client Referrals and Other Compensation

CLIENT REFERRALS

Left Coast Investment Strategies does not compensate third-parties (or "solicitors") to promote the investment advisory services offered by our firm. Any solicitor used would have to satisfy requirements under Wash. Rev. Code §21.20.005.

It is our firm's policy not to compensate clients for referring potential clients to our firm because the client would be considered a solicitor and would have to satisfy requirements under Rule 206(4)-3 of the Advisers Act or similar state rules regarding solicitation arrangements before a cash referral fee could be paid to them.

OTHER COMPENSATION

Left Coast Investment Strategies does not receive an economic benefit from anyone who is not a client in exchange for our provision of investment advice or other advisory service. Please refer above to Item 10 of this Brochure for additional information on these products or services.

Item 15 Custody

CUSTODY OF CLIENT FUNDS AND SECURITIES

Left Coast Investment Strategies does not have custody of clients' funds or securities, as the qualified custodian maintains custody of client funds and securities.

Interactive Brokers is the qualified custodian and maintains custody of client funds in separate brokerage account(s) for each client under the client's name. Left Coast Investment Strategies personnel may assist the client in preparing paperwork to open a new brokerage account at Interactive Brokers, but only the client is permitted to authorize, by their signature, the opening of the account. Interactive Brokers sends an account-opening letter to each client at their physical mailing address after the account is approved.

Left Coast Investment Strategies may be able to access certain clients' funds through its ability to instruct the custodian to debit advisory fees. In this case, Left Coast Investment Strategies will be considered to have custody of client assets. Left Coast Investment Strategies shall follow the safekeeping measures described under WAC 460-24A-106 of the Washington Administrative Code:

- We shall obtain written authorization from the client to deduct our advisory fees from their account(s) held with a qualified custodian.
- Each time a fee is deducted from the client's account(s) at the qualified custodian, we shall instruct the qualified custodian to send the client an invoice or statement of the amount of the fee to be deducted from the client's account. Itemization includes the name of the custodian, formula used to calculate the fee, the fee calculation itself, the value of the assets under management on which the fee is based, and the time period covered by the fee.

Clients can access daily, monthly, and annual account statements, as well as daily trade confirmations through a password-protected portion of Interactive Brokers' website, www.interactivebrokers.com. Clients should also expect to receive quarterly account summaries from the qualified custodian by first-class mail or electronic mail. Clients are urged to carefully review the account statements and summaries received from the qualified custodian(s) and compare such official custodial statements to any account reports and invoices provided by Left Coast Investment Strategies. Any client that does not receive an account statement or summary from the qualified custodian should call our firm immediately so that we can arrange to have another statement sent by the custodian.

Clients can also access information concerning their account(s) and access (and generally change) the settings for their brokerage account online on the Interactive Brokers website at www.interactivebrokers.com.

Item 16 Investment Discretion

AUTHORITY

Left Coast Investment Strategies manages client securities portfolios on a discretionary and non-discretionary basis. Left Coast Investment Strategies is often granted limited discretionary authority in writing by the client at the outset of the advisory relationship. This limited discretionary authorization gives Left Coast Investment Strategies the authority to manage the client's investment assets at our firm's sole discretion and without consulting with the client in advance, subject to the investment objectives, guidelines, and restrictions set by the client. The discretionary authority is established in the initial client agreement, as described in Item 4 of this brochure. This authorization will remain in full force and effect until we receive a written termination notice of the Investment Management Agreement from the client. If the client requires our firm to manage on a non-discretionary basis, we will not execute any trade or take any action on the client's account without prior written consent.

Left Coast Investment Strategies does not have discretionary authority to determine what broker-dealer to use or the amount of commissions that are charged by the broker-dealer or custodian.

Item 17 Voting Client Securities

AUTHORITY TO VOTE CLIENT PROXIES

Left Coast Investment Strategies does not accept authority from clients with respect to the voting of proxies solicited by, or with respect to, the issuers of any securities held in client portfolios. The qualified custodian holding clients' assets will send all such proxy documents it receives to the client so that the client may take whatever action the client deems appropriate. While Left Coast Investment Strategies will not provide an opinion or advice, however, we are available to answer questions.

The qualified custodian, and not Left Coast Investment Strategies, is responsible for the timely transmission of any proxy materials to clients.

Item 18 Financial Information

REQUIRED DISCLOSURES

As previously discussed in this brochure, Left Coast Investment Strategies may accept limited discretionary authority when providing investment management services if agreed upon in writing with the client. Left Coast Investment Strategies does not require clients to prepay more than $500 in fees six months or more in advance.

Left Coast Investment Strategies LLC has no financial commitments that would impair our firm's ability to meet our contractual and fiduciary commitments to our clients and have not been the subject of a bankruptcy proceeding.

Item 19 Requirements for State-Registered Advisers

EXECUTIVE OFFICERS AND MANAGEMENT PERSONS

Name: Marius Grigoriu

Year of Birth: 1981

Education:

Master of Business Administration
Rochester Institute of Technology, 2006
Rochester, NY

Bachelor's in Computer Engineering
Rochester Institute of Technology, 2004
Rochester, NY

Experience:

Managing Member and Chief Compliance Officer
Left Coast Investment Strategies LLC
Seattle, WA
August 2021 – Present

Sr. Engineering Manager
Smartsheet Inc.
Seattle, WA
November 2021 – Present

Broker
Columbia Partners Real Estate
Seattle, WA
February 2018 – Present

Founder
MAG Property Investments LLC
Seattle, WA
August 2014 – December 2021

Broker
ALLPRO Real Estate
Seattle, WA
June 2014 – January 2018

Senior Engineer Manager
Nordstrom
Seattle, WA
October 2011 – April 2021

Program Manager
Microsoft
Seattle, WA
July 2006 – October 2011

OUTSIDE BUSINESS ACTIVITIES

Please refer to Item 10 (Other Financial Industry Activities and Affiliations) of this Brochure for more information.

PERFORMANCE-BASED FEES

Please refer to Item 6 (Performance-Based Fees) of this Brochure for more information.

LEGAL OR DISCIPLINARY EVENTS

Neither Left Coast Investment Strategies, nor our management persons, have been involved or been found liable in any arbitration claims alleging damages more than $2,500 or been involved or been found liable in any civil, self-regulatory organization, or administration proceeding.

ISSUERS OF SECURITIES

Neither Left Coast Investment Strategies, nor our management persons, have any relationships or arrangements with any issuers of securities.

BUSINESS CONTINUITY PLAN

Left Coast Investment Strategies maintains a written Business Continuity Plan. Clients may request a copy by contacting our firm via our website at https://www.leftcoastinvest.com.

Form ADV Part 2B: Brochure Supplement
Item 1 Cover Page

Marius Grigoriu
CRD No. 7448718

for

Left Coast Investment Strategies LLC
Mailing Address:
620 S Orcas St #80142
Seattle, Washington 98108-9998
CRD No. 317112

This brochure supplement provides information about our supervised persons that supplements the Left Coast Investment Strategies LLC brochure. You should have received a copy of that brochure. Please contact our firm if you did not receive Left Coast Investment Strategies LLC's Brochure or if you have any questions about the contents of this supplement via our website at https://www.leftcoastinvest.com.

Additional information about the supervised persons mentioned in this brochure supplement is available on the SEC's website at www.adviserinfo.sec.gov.

Effective Date: December 31, 2023

SUPERVISED PERSONS: Marius Grigoriu (CRD No. 7448718)

ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Name: Marius Grigoriu

Year of Birth: 1981

Education:

Master of Business Administration
Rochester Institute of Technology, 2006
Rochester, NY

Bachelor's in Computer Engineering
Rochester Institute of Technology, 2004
Rochester, NY

Experience:

Managing Member and Chief Compliance Officer
Left Coast Investment Strategies LLC
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Broker
Columbia Partners Real Estate
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Founder
MAG Property Investments LLC
Seattle, WA
August 2014 – December 2021

Broker
ALLPRO Real Estate
Seattle, WA
June 2014 – January 2018

Senior Engineer Manager
Nordstrom
Seattle, WA
October 2011 – April 2021

Program Manager
Microsoft

Seattle, WA
July 2006 – October 2011

ITEM 3 DISCIPLINARY INFORMATION

Mr. Grigoriu has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of the integrity of our management.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Grigoriu, Managing Member of our firm, in his personal capacity, serves as a Broker at Columbia Partners Real Estate located in Seattle, WA. In this position, he identifies suitable residential and investment real estate, negotiates deals, and manages transactions. He typically spends 8 hours per month in this position. Left Coast Investment Strategies does not receive any commissions or compensation from Mr. Grigoriu's work in this position.

Mr. Grigoriu also serves as an Engineering Manager at Smartsheet Inc. located in Seattle, WA. In this position, he leads a team of software engineers building new features for their products. He spends approximately 160 hours per month in this position. Left Coast Investment Strategies does not receive any commissions or compensation from Mr. Grigoriu's work in this position.

As a result, Mr. Grigoriu's outside roles may present a potential conflict of interest because of him conducting other business activities during market trading hours, which could take time away from servicing advisory clients or the advisory firm.

ITEM 5 ADDITIONAL COMPENSATION

Other than the salary, annual bonuses, regular bonuses, or commissions from his role as a investment adviser representative, Mr. Grigoriu does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services.

ITEM 6 SUPERVISION

Marius Grigoriu is the sole Managing Member and Chief Compliance Officer ("CCO") of our firm and as such has no internal supervision placed over him. As such, he is supervising his own activities. He is, however, bound by our firm's Code of Ethics. The CCO may be contacted via our website at https://www.leftcoastinvest.com.

ITEM 7 REQUIREMENTS FOR STATE-REGISTERED ADVISERS

Mr. Grigoriu has not been involved or been found liable in any arbitration claims alleging damages more than $2,500 in any civil, self-regulatory organization, or administrative proceeding, or been subject of any bankruptcy petition.