



## Form ADV Part 2B – Brochure Supplement for

**Rakesh Khilnani**

CEO / CIO / CCO

**Effective: February 18, 2025**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Rakesh K. Khilnani (CRD# 2259700) in addition to the information contained in the Global Oppertune Investments LLC (“**goi**” or the “Advisor”, CRD# 319494) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the **goi** Disclosure Brochure or this Brochure Supplement, please contact us at 888-464-4742, 888-goi-4ria.

Additional information about Mr. Khilnani is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 2259700.

## Item 2 – Educational Background and Business Experience

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*Year of Birth:* 1963

*Formal Education After High School:*

Wayne State University– College of Engineering, Mechanical Engineering, 1988

### Employment History:

Chief Executive Officer, Chief Investment Officer, & Chief Compliance Officer, <b>goi</b>	04/2022 to Present
Chief Investment Officer, Global Capital Strategies II, LLC	06/2019 to 04/2022
Registered Principal, Arq Advisors LLC	01/2019 to 04/2022
Chief Executive Officer / Chief Compliance Officer, Global Capital Strategies LLC	01/2018 to 04/2022
Financial Advisor, Catella & Co. Inc.	01/2018 to 12/2018
Managing Principal, PIM Portfolio Manager, Wells Fargo Advisors Financial Network	05/2009 to 01/2018

## Item 3 – Disciplinary Information

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***There are no legal, civil or disciplinary events to disclose regarding Mr. Khilnani.*** Mr. Khilnani has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Khilnani.

Securities laws require an adviser to disclose any instances where the adviser or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Khilnani.***

However, we do encourage you to independently view the background of Mr. Khilnani on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 2259700.

## Item 4 – Other Business Activities

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### President

Mr. Khilnani is the President of Khilnani Wealth Management LLC. Mr. Khilnani spends approximately 1 hour per week in his role as the President.

### Insurance Agent

Mr. Khilnani is registered as an insurance agent but does not engage in any sales of commission based insurance products. He maintains this registration to be able to address insurance needs of clients through the financial planning process.

## Item 5 – Additional Compensation

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Mr. Khilnani has an other business activity where compensation is received that is detailed in Item 4 above.

## Item 6 – Supervision

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Mr. Khilnani serves as the Chief Investment Officer, Chief Executive Officer and Chief Compliance Officer of **goi**. Mr. Khilnani can be reached at 917-497-4191.

**goi** has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of **goi**. Further, **goi** is subject to regulatory oversight by various agencies. These agencies require registration by **goi** and its Supervised Persons. As a registered entity, **goi** is subject to examinations by regulators, which may be announced or unannounced. **goi** is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Adviser.

## **Item 7 – Requirements for State Registered Advisers**

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### **A. Arbitrations and Regulatory Proceedings**

State regulations require disclosure if any Supervised Person of the Adviser is subject to:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a. an investment or an investment-related business or activity;
  - b. fraud, false statement(s), or omissions;
  - c. theft, embezzlement, or other wrongful taking of property;
  - d. bribery, forgery, counterfeiting, or extortion; or
  - e. dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a. an investment or an investment-related business or activity;
  - b. fraud, false statement(s), or omissions;
  - c. theft, embezzlement, or other wrongful taking of property;
  - d. bribery, forgery, counterfeiting, or extortion; or
  - e. dishonest, unfair, or unethical practices.

Mr. Khilnani does not have any disclosures to make regarding this Item.

### **B. Bankruptcy**

If a Supervised Person has been the subject of a bankruptcy petition, that fact and the details must be disclosed.

Mr. Khilnani does not have any disclosures to make regarding this Item.