



**ELLIS**  
INVESTMENT PARTNERS LLC

920 Cassatt Rd.  
200 Berwyn Park, Suite 115  
Berwyn, PA 19312

Phone No: (484) 320-6300

July 15, 2020

**Item 1.** This brochure supplement provides information about Derek A. Lemke, CFP®, investment advisory representative of Ellis Investment Partners, LLC. This brochure is meant to supplement the Ellis Investment Partners, LLC firm brochure, a copy of which you should have received. Please contact Michelle Siano, Chief Compliance Officer, if you did not receive the Ellis Investment Partners, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Derek A. Lemke is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2. Educational and Business Experience**

### **Derek A. Lemke, CFP®**

Derek A. Lemke, born in 1971, is a Financial Planning & Portfolio Consultant of Ellis Investment Partners, LLC. Derek is a graduate of Salem International University with a Bachelor's Degree in Aviation Science and International Studies.

Derek is a Certified Financial Planner (CFP®), and has over 18 years of investment and financial planning experience. CFP® certificants must have a bachelor's degree (or higher), pass the comprehensive CFP® Certification Examination, pass CFP® Board's Fitness Standards for Candidates and Registrants, agree to abide by CFP® Board's Code of Ethics and Professional Responsibility and Rules of Conduct which put clients' interests first and comply with the Financial Planning Practice Standards which spell out what clients should be able to reasonably expect from the financial planning engagement. Finally, certificants must accumulate at least three years of full-time relevant personal financial planning experience.

Prior to joining Ellis Investment Partners, LLC, Derek experienced a successful career as a commercial pilot. In 2002 he began his career in financial planning and was associated with Key Advisors Group from January 2002 through January 2015.

Derek and his wife Melanie have been married for eight years and they have one daughter.

## **Item 3. Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is no disciplinary information to report for Derek A. Lemke.

**Item 4. Other Business Activities**

Derek A. Lemke's other business activity includes being a commercial pilot. Derek is also involved in the sale of insurance products through broker arrangements outside of Ellis Investment Partners. Derek's primary business activity is his association with Ellis Investment Partners.

**Item 5. Additional Compensation**

Derek does earn compensation for his role as a commercial pilot aside from his association with Ellis Investment Partners. In addition, Derek does earn compensation in the form of insurance commissions, for applicable insurance product sales. If clients of Ellis Investment Partners purchase insurance through Derek in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest may exist, although Derek always places his client's interest first and foremost.

**Item 6. Supervision**

Ellis Investment Partners, LLC has appointed a Chief Compliance Officer who is responsible for the overall supervision of the firm. Michelle Siano serves as Chief Compliance Officer of the firm. Michelle implements policies and procedures to ensure compliance with industry rules and regulations. She maintains required books and records to monitor the investment advice and recommendations made on behalf of the firm. Ellis Investment Partners has a specific Code of Ethics that applies to all employees. Michelle implements procedures to ensure employees comply with the firm's Code of Ethics, and she monitors all reports provided pursuant to the Code. Michelle is located in the firm's main office in Berwyn, PA, and she can be reached at 484-320-6300 or [michelle.siano@ellisinvestmentpartners.com](mailto:michelle.siano@ellisinvestmentpartners.com).