



**ELLIS**  
INVESTMENT PARTNERS LLC

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Phone No.: (484) 320-6300

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**Item 1.** This brochure supplement provides information about Nicholas Sun, CFS® 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 Nicholas Sun is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

### **Nicholas Sun CFS®**

Nicholas Sun, born in 1991, is a Portfolio Strategist of Ellis Investment Partners, LLC (EIP). Nick is a graduate of Kutztown University with a Bachelor of Science in Business Administration Degree in Business Management. Prior to joining Ellis Investment Partners, LLC, Nick held various positions within the food and retail industry.

In 2015, Nick earned the Certified Fund Specialist® (CFS®) designation, conferred by the Institute of Business and Finance. The Certified Fund Specialist designation is the oldest designation in the mutual fund industry and covers coursework that includes advanced topics in fund analysis and selection, asset allocation, and portfolio construction. Candidates for the designation also study sophisticated investment strategies for risk management, taxes, and estate planning. This professional designation helps Nick construct and manage portfolios based on clients' needs and objectives. His approach is driven by the asset allocation decision with a focus on overweighting or underweighting various sectors based on capital market expectations.

## **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 Nicholas Sun.

## **Item 4. Other Business Activities**

Nick's only business activity is his association with Ellis Investment Partners.

## **Item 5. Additional Compensation**

Nick's compensation is derived only from his association with Ellis Investment Partners.

## **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).