



**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 David Y. Sun, CFA® 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 David Y. Sun, CFA® is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

### **David Y. Sun, CFA®**

David Y. Sun, born in 1964, is the founder and President of Ellis Investment Partners, LLC. A 1988 graduate of Temple University, David earned a BBA in Business Management with minors in both Finance and Economics. David holds the Chartered Financial Analyst (CFA®) designation, which he earned in 1999, and has over 32 years' experience in the investment industry. To earn the CFA® designation, a candidate must successfully complete a graduate-level curriculum specifically focused on investment knowledge. Candidates must also meet professional conduct requirements and successfully pass three sequential, comprehensive examinations. Finally, candidates must accumulate at least four years of work experience in an investment field.

Prior to founding Ellis Investment Partners, LLC, David was associated with Capital Management Services, Inc. where he served as the firm's Director of Investments/Chief Investment Officer from November 2000 to December 2008 and Senior Portfolio Manager from January 2009 through March 2012. Prior to joining Capital Management Services, David was associated with Lincoln Financial Group, where he served as Regional Director of Investments from April 1990 through November 2000.

David and his wife, Antoinette, have been married for over 32 years, and they have two children.

## **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 David Y. Sun, CFA®.

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

David Y. Sun's sole business activity is that of President and Investment Manager for Ellis Investment Partners, LLC. He is engaged in no other business activity.

**Item 5. Additional Compensation**

David does not earn compensation from any other business activity aside 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).