



**ELLIS**  
INVESTMENT PARTNERS LLC

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

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

### **Evan Avgerinos, CBC, CFS®**

Evan Avgerinos, born in 1962, is a Financial Planning and Portfolio Consultant with Ellis Investment Partners, LLC. Evan is also founder and President of the Valley Forge Consulting Group, a financial planning and insurance brokerage firm specializing in employee benefits and retirement plans. Evan has been in the financial services industry for over 24 years, providing these services to privately and publicly held companies, including ones listed in Fortune 500. Evan provides investment management and financial planning services to business owners and corporate executives. Due to his experience with high net-worth clients, Evan has been invited to speak on financial planning concepts at industry events, including one held overseas. Evan holds the Chartered Benefits Consultant (CBC) designation, which he earned in 2008. The CBC designation identifies the holder as an expert in consumer-driven health insurance programs.

In 2014 Evan 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. Evan is a 1982 graduate of Pennsylvania State University, where he earned an A.S. (Associate of Science) degree.

Prior to joining Ellis Investment Partners, LLC as an original team member, Evan was associated with Capital Management Services, Inc. from December 2001 through March 2012. Prior to joining Capital Management Services, Inc., Evan was associated with Lincoln Financial Advisors from May 1994 through April 2001.

Evan is an active supporter for Child Advocates, which provides pro-bono support for abused children in Philadelphia. Evan and his wife, Mary, have been married for 25 years and have three 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 Evan Avgerinos CBC, CFS®.

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

In addition to his association with Ellis Investment Partners, LLC, Evan is the founder and President of Valley Forge Consulting Group, an employee benefits consulting firm offering various group medical, dental and disability insurance products to businesses. In addition, Evan is an instructor for Main Line Adult Financial Education, which was established to promote financial education to adults. Evan's activities with Ellis Investment Partners, Inc. serve to compliment the services he offers to his clients, by allowing him to offer comprehensive financial planning and asset management services in his capacity of an investment adviser representative of Ellis. Evan is careful to provide complete disclosure to clients in order to ensure they understand the services offered by each entity. A conflict of interest may exist in that the investment advice Evan provides may include recommendations for the purchase of products he sells through his association with Valley Forge Consulting. Evan endeavors at all time to place his clients' interests first and foremost, and any recommendations he makes are based on his clients' needs.

#### **Item 5. Additional Compensation**

In addition to his compensation with Ellis Investment Partners, LLC, Evan also receives compensation from his association with Valley Forge Consulting Group. He is compensated in the form of salary and commissions from the sale of insurance products. As stated above, a conflict of interest may exist in that the investment advice Evan provides may include recommendations for the purchase of products he sells through his association with Valley Forge Consulting, and for which product commissions may be earned. Evan endeavors at all time to place his clients' interests first and foremost, and any recommendations he makes are based on his clients' needs.

#### **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).