



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

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

### **Jennifer Garrett, CFA®**

Jennifer, born in 1961, is Senior Portfolio Manager with Ellis Investment Partners LLC. Jennifer has over 25 years of investment experience. She develops investment policy, including asset allocation strategies for high net worth individuals and institutions. She works closely with clients, balancing investment risk with performance in the determination of the proper asset mix. Prior to her association with Ellis, Jennifer served as Senior Portfolio Manager at Capital Management Services, Inc. from 2006 until March, 2013. She was a member of the Investment Policy Committee which developed investment policy and target asset allocations for the firm. Prior to this, she spent 17 years at Conservest Capital and its predecessors as Partner and Senior Portfolio Manager. In addition, she directed fixed income investments for the firm, managing over \$300 million in bonds and other fixed income securities.

In 1994, Jennifer earned the Chartered Financial Analyst® (CFA®) designation. 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' work experience in an investment field. Jennifer graduated Drew University in 1983 with a BA in Economics and a minor in French. She serves on the boards of two non-profit organizations.

Jennifer and her husband Anthony have been married for over 20 years. They have twin sons.

## **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 Jennifer Garrett, CFA®.

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

Jennifer Garrett's only business activity is her association with Ellis Investment Partners. She serves on the board of two non-profit organizations; however, Jennifer is not compensated for her roles with these organizations.

**Item 5. Additional Compensation**

Jennifer's compensation is derived only from her association with Ellis Investment Partners, LLC. She does not earn any other compensation.

**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).