



ELLIS
INVESTMENT PARTNERS LLC

Don Avgerinos CBC, CEP[®], RICP[®], CFS[®]

920 Cassatt Road
200 Berwyn Park, Suite 115
Berwyn, PA 19312
Phone No. (484) 320-6300

March 1, 2023

This brochure supplement provides information about Don Avgerinos CBC, CEP[®], RICP[®], CFS[®] that supplements the Ellis Investment Partners, LLC brochure. You should have received a copy of that brochure. Contact us at 484-320-6300 if you did not receive Ellis Investment Partners, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Don Avgerinos (CRD #4267162) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational and Business Experience

Don Avgerinos, CBC, CEP®, RICP®, CFS®

Year of Birth: 1963

Don is a Financial Planning Consultant with Ellis Investment Partners, LLC. Don earned his Certified Estate Planner CEP® designation from the National Institute of Certified Estate Planners in 2009. To earn the CEP designation, candidates must complete a self-study program and successfully pass a comprehensive qualifying examination. In addition, Don must complete at least 8 hours of continuing education in estate planning at least every two years. In 2014, Don earned his Retirement Income Certified Professional® (RICP®) Designation from the American College. To receive the RICP designation, a candidate must successfully complete and pass three sequential, comprehensive examinations, meet a three-year full-time business experience such as client service and related management, including direct contact with clients, supervision and management of persons involved directly in the process of providing financial services or employee benefits and agree to comply with the American College Code of Ethics and Procedures. Participation in the Professional Recertification Program is also required. In 2016 Don 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. Don earned the National Social Security Advisor (NSSA) Certificate from The National Social Security Association in 2018. To earn the NSSA designation, candidates must complete a self-study program and successfully pass a qualifying examination. In addition, Don must complete at least 16 hours of continuing education requirements every two years.

In addition to the above, Don is also the CEO and President of Spectrum Financial Group, Inc., a financial services firm he founded in 1997. Don earned the Chartered Benefit Consultant (CBC) designation from The National Association of Alternative Benefits Consultants (NAABC) in 2008. To earn the designation, candidates must attend 15 hours of instructed class training and pass a comprehensive final examination with a score of 80% or better.

Prior to joining Ellis Investment Partners, LLC in March 2012, Don was associated with Capital Management Services, Inc. as an Investment Advisor Representative from March 2004 through March 2012. Don was also associated with Equity Services, Inc., as a registered representative, from June 2001, through December 2008.

In addition to being active in the financial services community, Don is also committed to supporting the local community. Don is currently an instructor of a financial education workshop. He is also the host of the Retirement Income Show, and he volunteers in his community as a first responder with certifications in firefighting and vehicle rescue. He lives in Kimberton Pennsylvania with his wife Helen and two children.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Don Avgerinos, CBC, CEP®, RICP®, CFS® has had no disciplinary information under this item.

Item 4 Other Business Activities

Don's other business activity includes being a licensed insurance producer and president of Spectrum Financial Group, Inc. Don's role with Spectrum Financial Group, Inc. is his primary business activity. In addition, he is the founder of Main Line Adult Financial Education, which was established to promote financial education to adults. Don's activities with Ellis Investment Partners, Inc. serve to compliment the services he offers to his clients, by allowing him to offer comprehensive retirement income planning and asset management services in his capacity as an investment adviser representative of Ellis. Don is careful to provide complete disclosure to clients in order to ensure they understand the services offered by each entity. He is engaged in no other business activity.

Item 5 Additional Compensation

Don does earn compensation from his association with Spectrum Financial Group, Inc. He is compensated in the form of salary and commissions from the sale of insurance products. If clients of Ellis Investment Partners, LLC purchase insurance contracts through Don in his capacity as an insurance agent, he may earn commissions on those sales. Thus, a conflict of interest may exist, although Don always places his client's interest first and foremost.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Ellis Investment Partners, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines. His supervisor is: Nick Sun, Chief Compliance Officer. He can be reached at 484-320-6300 or nick.sun@ellisinvestmentpartners.com.