Jonathan D. Smith, CFP®, MSTF

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This brochure supplement provides information about Jonathan D. Smith, CFP®, MSTF 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 Jonathan D. Smith (CRD#4843601) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational and Business Experience

Jonathan D. Smith, CFP®, MSTF
Year of Birth: 1980

Jonathan D. Smith is a Financial Planning & Portfolio Consultant of Ellis Investment Partners, LLC. Jonathan is also the founder and President of Wealth Planning Solutions, LLC, a financial planning, and insurance brokerage firm. A 2003 Summa Cum Laude graduate of Widener University, Jonathan earned a Bachelor of Science in Economics and minors in Finance and Accounting. In 2008, he also completed his Master's in Taxation and Financial Planning at Widener University.

Jonathan is a Certified Financial Planner (CFP®), which he earned in 2006, and has over 20 years' experience in the investment & financial planning industry. CFP® certificants must have a bachelor's degree (or higher), pass the comprehensive CFP® Certification Examination, pass CFP Board's Fitness Standards for Candidates and Registrants, agree to abide by CFP Board's Code of Ethics and Professional Responsibility and Rules of Conduct which put clients' interests first and comply with the Financial Planning Practice Standards which spell out what clients should be able to reasonably expect from the financial planning engagement. Finally, certificants must accumulate at least three years of full-time relevant personal financial planning experience.

Jonathan and his wife, Beth, have been married for over 19 years, and they have four 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. Jonathan D. Smith has no required disclosures under this item.

Item 4 Other Business Activities

Jonathan D. Smith's other business activity includes insurance agent/broker through Wealth Planning Solutions, LLC. He is engaged in no other business activity.

Item 5 Additional Compensation

Jonathan does earn compensation from Wealth Planning Solutions, LLC aside from his association with Ellis Investment Partners. This compensation is in the form of insurance commissions, for applicable insurance product sales. If clients of Ellis Investment Partners purchase insurance through Jonathan in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest may exist, although Jonathan 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.