



**ELLIS**  
INVESTMENT PARTNERS LLC

## **Michelle Siano**

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 Michelle Siano 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 Michelle Siano (CRD #4085204) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational and Business Experience

### **Michelle Siano**

Year of Birth: 1978

Michelle Siano is a Portfolio Consultant of Ellis Investment Partners, LLC. Michelle is a 2001 graduate of Temple University's Fox School of Business with a Bachelor of Business Administration Degree in Finance and International Business. Michelle started her career in the financial services industry as a Financial Advisor in Smith Barney's retail client division in 2004. Prior to joining Ellis Investment Partners, LLC, Michelle was a Financial Advisor with Next Financial.

## 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. Ms. Michelle Siano has no required disclosures under this item.

## Item 4 Other Business Activities

Michelle's other business activity includes the sale of insurance products through other broker arrangements outside of Ellis Investment Partners. She is engaged in no other business activity.

## Item 5 Additional Compensation

Michelle does earn compensation from other insurance broker arrangements aside from her 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 Michelle in her capacity as an insurance agent, she may earn product commissions on those sales. Thus, a conflict of interest may exist, although Michelle always places her 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. Her supervisor is: Nick Sun, Chief Compliance Officer. He can be reached at 484-320-6300. [nick.sun@ellisinvestmentpartners.com](mailto:nick.sun@ellisinvestmentpartners.com).