



**ELLIS**  
INVESTMENT PARTNERS LLC

**Michael A. Newman, M.B.A., ChFC<sup>®</sup>, CLU<sup>®</sup>**

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This brochure supplement provides information about Michael A. Newman, M.B.A., ChFC<sup>®</sup>, CLU<sup>®</sup> 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 Michael A. Newman (CRD#2145294) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational and Business Experience

**Michael A. Newman, M.B.A., CLU®, ChFC®**

Year of Birth: 1955

Michael A. Newman is a Financial Planning & Portfolio Consultant of Ellis Investment Partners, LLC. He works with professionals, closely held business owners and affluent individuals, providing solutions in the areas of estate, investment, retirement, and business succession planning. With over 30 years of experience in the financial services industry, his expertise also includes the use of life insurance and trust planning. Mike holds the Chartered Life Underwriter® (CLU®) designation, which he earned in 2004, and the Chartered Financial Consultant® (ChFC®) designation, which he earned in 2000. Both professional designations were conferred by the American College in Bryn Mawr, Pennsylvania. The CLU® designation is the highest level professional designation available in the insurance industry. The designation requires completion of eight courses designed to allow candidates to gain in-depth knowledge about the insurance needs of individuals, business owners and other professional clients. The ChFC® designation requires completion of nine courses, in key financial planning areas such as insurance, income taxation, retirement planning, investments and estate planning.

Mike earned a Bachelor of Science degree in Architecture from The Ohio State University in 1978, and an MBA from Temple University in 1989. Prior to joining Ellis Investment Partners, LLC as an original team member, Mike was associated with Capital Management Services, Inc. from February 2002 through March 2012. Prior to joining Capital Management Services, Inc., Mike was associated with Lincoln Financial Advisors/Sagemark Consulting from June 1998 through January 2002.

Mike and his wife, Diane, have been married 36 years and have three 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. Michael A. Newman has no required disclosures under this item.

## Item 4 Other Business Activities

Michael A. Newman's other business activity includes the sale of insurance products through other broker arrangements outside of Ellis Investment Partners. He is engaged in no other business activity.

## Item 5 Additional Compensation

Mike does earn compensation from other insurance broker arrangements 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 Mike in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest may exist, although Mike 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](mailto:nick.sun@ellisinvestmentpartners.com).