



**ELLIS**  
INVESTMENT PARTNERS LLC

**Nicholas Sun, CFS®**

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This brochure supplement provides information about Nicholas Sun, 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 Nicholas Sun (CRD #6908936) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational and Business Experience

### **Nicholas Sun CFS®**

Year of Birth: 1991

Nicholas Sun is a Portfolio Strategist of Ellis Investment Partners, LLC (EIP) , and he also serves as the firm's Chief Compliance Officer. Nicholas is a graduate of Kutztown University with a Bachelor of Science in Business Administration Degree in Business Management. Prior to joining Ellis Investment Partners, LLC, Nicholas held various positions within the food and retail industry.

In 2015, Nicholas 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. This professional designation helps Nicholas construct and manage portfolios based on clients' needs and objectives. His approach is driven by the asset allocation decision with a focus on overweighting or underweighting various sectors based on capital market expectations.

## 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. Drew Schaffer has no required disclosures under this item.

## Item 4 Other Business Activities

Nicholas's only business activity is his association with Ellis Investment Partners.

## Item 5 Additional Compensation

Nicholas's compensation is derived only from his association with Ellis Investment Partners.

## 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: David Sun, President of Ellis Investment Partners, LLC. David and Nicholas can be reached at 484-320-6300 or [nick.sun@ellisinvestmentpartners.com](mailto:nick.sun@ellisinvestmentpartners.com).