



ELLIS
INVESTMENT PARTNERS LLC

Samuel M. Carpin, CFS[®], CIMA[®]

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This brochure supplement provides information about Samuel M. Carpin, CFS[®], CIMA[®] 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 Samuel Carpin, CFS[®] CIMA[®] (CRD #4384129) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational and Business Experience

Samuel Carpin, CFS® CIMA®

Year of Birth: 1979

Samuel is a Financial Planning and Portfolio Consultant with Ellis Investment Partners LLC. Prior to joining Ellis Investment Partners LLC in February 2013, Samuel was with Capital Management Services, Inc. from January 2001 until February 2013. Sam earned his Bachelor of Science in Finance from The Pennsylvania State University in 2001. He began his career in finance by working as a junior analyst for ARIS Wealth Management before moving to Capital Management Services, Inc. in 2001. Sam was a Registered Representative for Equity Services, Inc. from 2001 through 2010, and in 2010 he joined Comprehensive Asset Management (CAMAS), later known as APW Capital, Inc., where he was a Registered Representative until July 2018. Sam currently sits on the Board of Coffee Bird, Ltd., an import/export commodity company based in the UK and Guatemala. Sam is a past member of the Board of Tech Adventure, a UK-based business application development company.

In 2006, Samuel 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.

In 2019, Samuel earned the Certified Investment Management Analyst® (CIMA®) designation conferred by the Investments and Wealth Institute through Wharton Business School. The CIMA Core of Body of Knowledge includes five knowledge domains covering 22 knowledge sections that investment advisors and consultants with at least three years' experience are required to know.

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. Samuel Carpin has no required disclosures under this item.

Item 4 Other Business Activities

Sam's other business activities include managing 5 rental properties. Sam's primary business activity is his association with Ellis Investment Partners. Sam is also licensed as an insurance agent through his company, The Carpin Group, Inc. Sam's activities with Ellis are separate and apart from his activities with this entity.

Item 5 Additional Compensation

Sam is licensed as an insurance agent. If clients purchase insurance products from Sam, he may receive separate, yet customary compensation in the form of an insurance commission. The receipt of commissions may give Sam an incentive to recommend insurance products based on the compensation earned rather than the client's needs. However, Sam endeavors to put client interests first and foremost when making recommendations.

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.