



**ELLIS**  
INVESTMENT PARTNERS LLC

**Evan Avgerinos, CBC, CFS®**

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March 1, 2023

This brochure supplement provides information about Evan Avgerinos, CBC, 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 Evan Avgerinos (CRD #2496249) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational and Business Experience

### **Evan Avgerinos, CBC, CFS®**

Year of Birth: 1962

Evan Avgerinos is a Financial Planning and Portfolio Consultant with Ellis Investment Partners, LLC. Evan is also founder and President of the Valley Forge Consulting Group, a financial planning and insurance brokerage firm specializing in employee benefits and retirement plans. Evan has been in the financial services industry for over 30 years, providing these services to privately and publicly held companies, including ones listed in Fortune 500. Evan provides investment management and financial planning services to business owners and corporate executives. Due to his experience with high net-worth clients, Evan has been invited to speak on financial planning concepts at industry events, including one held overseas. Evan holds the Chartered Benefits Consultant (CBC) designation, which he earned in 2008. The CBC designation identifies the holder as an expert in consumer-driven health insurance programs.

In 2014 Evan 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. Evan is a 1982 graduate of Pennsylvania State University, where he earned an A.S. (Associate of Science) degree.

Prior to joining Ellis Investment Partners, LLC as an original team member, Evan was associated with Capital Management Services, Inc. from December 2001 through March 2012. Prior to joining Capital Management Services, Inc., Evan was associated with Lincoln Financial Advisors from May 1994 through April 2001.

Evan is an active supporter for Child Advocates, which provides pro-bono support for abused children in Philadelphia. Evan and his wife, Mary, have been married for 29 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. Evan Avgerinos CBC, CFS® has no required disclosures under this item.

## **Item 4 Other Business Activities**

In addition to his association with Ellis Investment Partners, LLC, Evan is the founder and President of Valley Forge Consulting Group, an employee benefits consulting firm offering various group medical, dental and disability insurance products to businesses. In addition, Evan is an instructor for Main Line Adult Financial Education, which was established to promote financial education to adults. Evan's activities with Ellis Investment Partners, Inc. serve to compliment the services he offers to his clients, by allowing him to offer comprehensive financial planning and asset management services in his capacity of an investment adviser representative of Ellis. Evan is careful to provide complete disclosure to clients in order to ensure they understand the services offered by each entity. A conflict of interest may exist in that the investment advice Evan provides may include recommendations for the purchase of products he sells through his association with Valley Forge Consulting. Evan endeavors at all time to place his clients' interests first and foremost, and any recommendations he makes are based on his clients' needs.

## **Item 5 Additional Compensation**

In addition to his compensation with Ellis Investment Partners, LLC, Evan also receives compensation from his association with Valley Forge Consulting Group. He is compensated in the form of salary and commissions from the sale of insurance products. As stated above, a conflict of interest may exist in that the investment advice Evan provides may include recommendations for the purchase of products he sells through his association with Valley Forge Consulting, and for which product commissions may be earned. Evan endeavors at all time to place his clients' interests first and foremost, and any recommendations he makes are based on his clients' needs.

## **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).