

Derek A. Lemke, CFP®

920 Cassatt Road 200 Berwyn Park, Suite 115 Berwyn, PA 19312 Phone No. (484) 320-6300

January 23, 2025

This brochure supplement provides information about Derek Lemke, CFP® 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 Derek A. Lemke (CRD #4499667) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational and Business Experience

Derek A. Lemke, CFP®

Year of Birth: 1971

Derek A. Lemke is a Financial Planning & Portfolio Consultant of Ellis Investment Partners, LLC. Derek is a graduate of Salem International University with a Bachelor's Degree in Aviation Science and International Studies.

Derek is a Certified Financial Planner (CFP®) and has over 20 years of investment and financial planning experience. CFP® certificants must have a bachelor's degree (or higher), pass the comprehensive CFP® Certification Examination, pass CFP® Board's Fitness Standards for Candidates and Registrants, agree to abide by CFP® Board's Code of Ethics and Professional Responsibility and Rules of Conduct which put clients' interests first and comply with the Financial Planning Practice Standards which spell out what clients should be able to reasonably expect from the financial planning engagement. Finally, certificants must accumulate at least three years of full-time relevant personal financial planning experience.

In addition to Ellis Investment Partners, LLC, Derek is an experienced commercial pilot with American Airlines. In 2002 he began his career in financial planning and was associated with Key Advisors Group from January 2002 through January 2015.

Derek and his wife Melanie have been married for over ten years and they have one daughter.

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. Derek Lemke has no required disclosures under this item.

Item 4 Other Business Activities

Derek A. Lemke's other business activity includes being a commercial pilot. Derek is also involved in the sale of insurance products through broker arrangements outside of Ellis Investment Partners. Derek's primary business activity is his association with Ellis Investment Partners

Item 5 Additional Compensation

Derek does earn compensation for his role as a commercial pilot aside from his association with Ellis Investment Partners. In addition, Derek does earn compensation in the form of insurance commissions, for applicable insurance product sales. If clients of Ellis Investment Partners purchase insurance through Derek in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest may exist, although Derek 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.