

# Christian Grude, ChFC 920 Cassatt Rd. 200 Berwyn Park, Suite 115 Berwyn, PA 19312

Phone No.: (484) 320-6300

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**Item 1.** This brochure supplement provides information about Christian Grude, ChFC investment advisory representative of Ellis Investment Partners, LLC. This brochure is meant to supplement the Ellis Investment Partners, LLC firm brochure, a copy of which you should have received. Please contact Michelle Siano, Chief Compliance Officer, if you did not receive the Ellis Investment Partners, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Christian Grude is available on the SEC's website at www.adviserinfo.sec.gov.

#### Item 2. Educational and Business Experience

#### <u>Christian Grude, ChFC</u>®

Christian Grude, born in 1942, is a Chartered Financial Consultant with 30+ years of investment and financial planning experience working with small business owners, families, non-profit organizations, and high-net-worth individuals in providing insurance, financial planning and portfolio management services with a client-centric-based strategy. Prior to joining Ellis, Christian was founder and principal of Key Financial Advisors, LLC, a registered investment advisor located in Paoli, PA for 20 years. He was also previously associated with Lincoln Financial Advisors for over 10 years. Christian earned a Bachelor degree in History from Susquehanna University in 1965, and his Chartered Financial Consultant designation in 2007. The ChFC® designation requires completion of nine courses, in key financial planning areas such as insurance, income taxation, retirement planning, investments and estate planning.

## Item 3. Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is no disciplinary information to report for Christian Grude.

#### Item 4. Other Business Activities

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

## Item 5. Additional Compensation

Christian earns compensation from insurance broker arrangements outside of 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 Christian in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest exists, although Christian always places his client's interest first and foremost.

#### Item 6. Supervision

Ellis Investment Partners, LLC has appointed a Chief Compliance Officer who is responsible for the overall supervision of the firm. Michelle Siano serves as Chief Compliance Officer of the firm. Michelle implements policies and procedures to ensure compliance with industry rules and regulations. She maintains required books and records to monitor the investment advice and recommendations made on behalf of the firm. Ellis Investment Partners has a specific Code of Ethics that applies to all employees. Michelle implements procedures to ensure employees comply with the firm's Code of Ethics, and she monitors all reports provided pursuant to the Code. Michelle is located in the firm's main office in Berwyn, PA, and can be reached at 484-320-6300 or <u>michelle.siano@ellisinvestmentpartners.com</u>.