



**ELLIS**  
INVESTMENT PARTNERS LLC

920 Cassatt Rd.  
200 Berwyn Park, Suite 115  
Berwyn, PA 19312

Phone No.: (484) 320-6300

January 24, 2019

**Item 1.** This brochure supplement provides information about Michael A. Newman, M.B.A., CLU®, 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 Michael A. Newman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2. Educational and Business Experience**

### **Michael A. Newman, M.B.A., CLU®, ChFC®**

Michael A. Newman, born in 1955, is a Financial Planning & Portfolio Consultant of Ellis Investment Partners, LLC. He works with professionals, closely-held business owners and affluent individuals, providing solutions in the areas of estate, investment, retirement and business succession planning. With over 28 years of experience in the financial services industry, his expertise also includes the use of life insurance and trust planning. Mike holds the Chartered Life Underwriter® (CLU®) designation, which he earned in 2004, and the Chartered Financial Consultant® (ChFC®) designation, which he earned in 2000. Both professional designations were conferred by the American College in Bryn Mawr, Pennsylvania. The CLU® designation is the highest level professional designation available in the insurance industry. The designation requires completion of eight courses designed to allow candidates to gain in-depth knowledge about the insurance needs of individuals, business owners and other professional clients. The ChFC® designation requires completion of nine courses, in key financial planning areas such as insurance, income taxation, retirement planning, investments and estate planning.

Mike earned a Bachelor of Science degree in Architecture from The Ohio State University in 1978, and an MBA from Temple University in 1989. Prior to joining Ellis Investment Partners, LLC as an original team member, Mike was associated with Capital Management Services, Inc. from February 2002 through March 2012. Prior to joining Capital Management Services, Inc., Mike was associated with Lincoln Financial Advisors from June 1998 through January 2002.

Mike and his wife, Diane, have been married 32 years and have three children.

## **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 Michael A. Newman.

**Item 4. Other Business Activities**

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

**Item 5. Additional Compensation**

Mike does earn compensation from other insurance broker arrangements aside from 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 Mike in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest may exist, although Mike 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 she can be reached at 484-320-6300 or [michelle.siano@ellisinvestmentpartners.com](mailto:michelle.siano@ellisinvestmentpartners.com).