



**ELLIS**  
INVESTMENT PARTNERS LLC

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January 24, 2019

**Item 1.** This brochure supplement provides information about Ross Muldoon, CFP®, 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 Ross Muldoon, CFP® is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

### **Ross Muldoon, CFP®**

Ross, born in 1984, is the Director of Portfolio Management Operations for Ellis Investment Partners LLC. He joined the firm in January of 2013. Prior to joining Ellis Investment Partners, LLC, Ross was Manager of Operations and Client Services at Capital Management Services, Inc., from March 2006 - December 2012. Ross earned a Bachelor of Science in Business Administration from Widener University in 2006.

In January 2013, Ross earned the Certified Financial Planner (CFP®) designation. The Certified Financial Planner (CFP®) designation is a professional certification mark for financial planners. It is conferred by the Certified Financial Planner Board of Standards, Inc. after candidates have met all of the requirements for certification. Those requirements include having completed a Board- Registered educational program, having at least three years of qualifying work experience in the personal financial planning area, and passing the CFP® Certification Examination. The exam, which is administered over two days, tests a financial planner's ability to apply his or her knowledge to specific client situations. Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct to maintain the right to continue to use the CFP® marks.

Ross and his wife, Kimberly have been married over eight years.

## **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 Ross Muldoon, CFP®.

## **Item 4. Other Business Activities**

Ross Muldoon'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**

Ross 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 Ross in his capacity as an insurance agent, he may earn product commissions on those sales. Thus, a conflict of interest may exist, although Ross 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).