



**ELLIS**  
INVESTMENT PARTNERS LLC

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**Item 1.** This brochure supplement provides information about Woodward T. Odiorne, 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 Woodward T. Odiorne, CLU®, ChFC® is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

### **Woodward T. Odiorne, CLU®, ChFC®**

Woodward T. Odiorne, CLU®, ChFC®, born in 1942, is a Senior Financial Consultant of Ellis Investment Partners, LLC. Woody is a 1964 graduate of Lafayette College, where he earned a Bachelor of Arts degree in Economics. Woody holds the Chartered Life Underwriter® (CLU®) designation, which he earned in 1971, and the Chartered Financial Consultant® (ChFC®) designation, which he earned in 1987. 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.

Prior to joining Ellis Investment Partners, LLC, Woody was associated with Capital Management Services, Inc. from April 2001 through March 2012, where he served as Senior Financial Consultant. He was also a registered representative of Equity Services, Inc., from March 1985 through April 2010, and of Comprehensive Asset Management and Servicing (CAMAS) from May 2010 through March 2012.

Woody and his wife, Bonnie, live in West Chester, Pennsylvania, and have been married for over 54 years. They have three children and seven grandchildren.

## **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 Woodward T. Odiorne, CLU®, ChFC®.

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

Woodward T. Odiorne'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**

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