Guiding Investors in a New Financial World

Ellis Investment Partners LLC offers the kind of shrewd, flexible and forward-thinking advice needed during challenging times.

The team:
(front row, l to r)
Woody Odiorne, Jennifer Garrett, David Sun, Dan Kelley
(back row, l to r)
Robin Sun, Ross Muldoon, Evan Avgerinos, Mike Newman, Don Avgerinos, Jonathan Smith
(not pictured) Sam Carpin

When David Sun and his colleagues launched their new wealth management firm in 2012, they named it after Ellis Island. Like the famous gateway for millions of U.S. immigrants, the firm guides people seeking opportunities in a new world.

That new world, as revealed by the 2008 financial crisis, often violates the traditional rules of investing. Investors need to be quick, careful and proactive to achieve their financial dreams in today's changing times.

With its commitment to strong client relationships and in-depth analysis, Ellis Investment Partners LLC (EIP LLC) helps investors make sense of this new reality. "Not only are we able to think outside the box, we're able to actually execute," Sun says.

One of Sun's colleagues and close friends, Dan Kelley often states, "The size of our firm enables us to be very flexible. We're like a fast-attacking PT boat, not a lumbering aircraft carrier."

Clients Before Growth

EIP LLC's commitment to clients is built into its business model. The firm's policy states that each advisor should not take on more than 60 client relationships. This policy might slow the firm's growth, but it allows for a personal touch that's often missing at other firms.

Advisors are in touch with their clients at least quarterly, staying in close contact as the market changes and updating portfolios as needed to stay on track with goals and objectives. The 60-1 ratio allows each advisor to truly understand each client's unique situation when making investment decisions.

In addition to relying on third-party resources, the firm looks at underlying fundamental variables and macroeconomic factors when analyzing individual companies, sectors and asset classes.

"Clients coming from other firms typically notice the difference in our approach after the first two quarters," Sun says.

Fostering Healthy Relationships

Though a relatively new venture, EIP LLC is comprised of seasoned veterans with long track records at corporate and boutique financial firms. In their first 18 months, Sun and his partners (some of whom have worked together for more than 20 years) have attracted nearly 400 clients—including trusts, foundations, endowments, pensions and high net worth individuals—and accumulated about $300 million in assets under management.

"Establishing client relationships where we add value is a priority," Sun notes. The firm measures its growth by the number of client relationships and its success by the level of client satisfaction.

"Clients can sense that we're really on top of things," Sun says, "and that gives them a great deal of comfort and confidence."

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INVESTMENT PARTNERS LLC

Ellis Investment Partners LLC, *an SEC Registered Investment Advisor, is located at 920 Cassatt Road in building 200 Berwyn Park, Suite 115 in Berwyn, PA. For more information, call* **484-320-6300** *or visit* **ellisinvestmentpartners.com**.