



Firm Brochure Supplements
(Part 2B of Form ADV)

Kovitz Investment Group Partners, LLC
d/b/a Telemus Capital

www.telemus.com

eoppenheim@telemus.com

April 1, 2025



Firm Brochure Supplement
(Part 2B of Form ADV)

Kovitz Investment Group Partners, LLC
d/b/a Telemus Capital

Two Towne Square, Suite 800

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eoppenheim@telemus.com

Item 1: This brochure supplement provides information about **Mary Faessler Bakhaus** that supplements Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Mary Faessler Bakhaus** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Mary Faessler Bakhaus

Date of Birth: 1949

Educational Background:

- New York Institute of Finance, Securities Industry Institute, 1975
- Wayne State University, 1968 - 1971

Business Experience:

- Senior Wealth Advisor, Kovitz Investment Group Partners, LLC – 2025 to Present
- Senior Financial Life Advisor and Senior Portfolio Manager, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Senior Financial Life Advisor and Senior Portfolio Manager, Telemus Capital, LLC, 2015 to 2024
- Managing Partner of Fixed Income/Senior Portfolio Manager, Telemus Capital, LLC, 2013 to 2015

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

Mary Faessler Bakhaus is supervised by Mike Blehar, Principal, National Practice Management Leader. He reviews Ms. Bakhaus' work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Andrew R. Bass** that supplements the Kovitz Investment Group Partners, LLC (“Kovitz”) brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Andrew R. Bass** is available on the SEC’s website at www.adviserinfo.sec.gov

April 1, 2025

Item 2: Educational Background and Experience

Name: Andrew R. Bass, CPA, CWM, PFS

Date of Birth: 1951

Educational Background:

- Master of Business Administration, School of Business Administration (now Ross School of Business), University of Michigan, 1975
- Bachelor of Business Administration, School of Business Administration (now Ross School of Business), University of Michigan, 1973

Professional Designations:

- Personal Financial Specialist (PFS), 2010. Personal financial specialists are licensed by the American Institute of CPAs. PFS certification requirements are:
 - (a) Certified public accountant license, which must be current and in good standing.
 - (b) Minimum 80 hours personal financial planning education within five years preceding PFS application. Education must cover nine areas that make up the PFS body of knowledge.

Business Experience:

- Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Chief Wealth Officer of Telemus Capital, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Chief Wealth Officer, Telemus Capital, LLC, 2015 to 2024

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

Andrew R. Bass is supervised by Ari Fischman, Principal, Senior Insurance Advisor. He reviews Mr. Bass's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Kyle Deal** that supplements the Kovitz Investment Group Partners, LLC (“Kovitz”) brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Kyle Deal** is available on the SEC’s website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Kyle Deal

Date of Birth: 1993

Educational Background:

- Bachelor of Applied Science in Financial Planning, University of Illinois at Urbana-Champaign, 2016

Professional Designation:

- Certified Financial Planner (CFP), 2019. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.

Business Experience:

- Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2023 to Present
- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Associate Financial Life Advisor, Telemus Capital, LLC, 2020 to 2024
- Client Service Associate, Huber Financial Advisors, LLC, 2016 to 2020

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Kyle Deal is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Deal is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Deal. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Kyle Deal is supervised by Steve Putzel, Principal, Regional Practice Leader. He reviews Mr. Deal's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Ari Fischman** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Ari Fischman** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Ari Fischman

Date of Birth: 1979

Educational Background:

- Bachelor of Arts in Sociology, Queens College, 2002

Professional Designation:

- Certified Financial Planner (CFP), 2014. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.
- Life Underwriter Training Council Fellow (LUTCF), 2003. The certification is awarded by the National Association of Insurance and Financial Advisors (NAIFA), in conjunction with the College of Financial Planning. LUTCF certification requirements are:
 - (a) Complete the LUTCF six-course curriculum and ethics course.
 - (b) Maintain membership in a local association of NAIFA.
 - (c) Pass a final exam.
 - (d) Complete 3 hours of ethics-related continuing education every two years (for designees who earned their credential on or after 1/1/2010).

Business Experience:

- Principal and Senior Insurance Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2024 to Present
- Registered Representative, Lion Street Financial, LLC, 2022 to Present
- Senior Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024

- Senior Financial Life Solutions and Partner, Telemus Capital, LLC, 2023 to 2024
- Chief Executive Officer, Fischman Insurance Group, LLC, 2010 to 2024
- Financial Life Advisor, Telemus Capital, LLC, 2020 to 2022

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

As of October 17, 2022, Ari Fischman become a Registered Representative of Lion Street Financial, LLC which is a registered broker-dealer ("Lion Street Broker-Dealer"). Under this arrangement, he will offer products and services available through Lion Street Broker-Dealer to the clients of Telemus Insurance Services ("TIS"), Kovitz's affiliated insurance agency. Neither Kovitz nor TIS will receive referral fees for the sales of these products and services under the above referral arrangement.

Item 5: Additional Compensation

Mr. Fischman is an officer of our affiliated entity Telemus Insurance Services, LLC, a Delaware LLC ("TIS"). TIS is licensed as an insurance agency in Michigan and in other jurisdictions as required. Mr. Fischman refers clients and prospective clients to TIS for various insurance products and services such as life, disability and long-term care policies and annuity contracts, and makes referrals to third party providers for property and casualty and group health insurance, for which he could potentially be compensated. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Ari Fischman is supervised by Ted Bovard, Principal, Head of Advisor Personnel. He reviews Mr. Fischman's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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eoppenheim@telemuscapital.com

Item 1: This brochure supplement provides information about **Andrew D. Hambleton** that supplements the Telemus Capital, LLC ("TC") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Chief Compliance Officer, if you did not receive the TC brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com.

Additional information about **Andrew D. Hambleton** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Andrew D. Hambleton

Date of Birth: 1992

Educational Background:

- Bachelor of Science, Rollins College, 2014

Professional Designation:

- Certified Financial Planner (CFP), 2023. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.
- Accredited Wealth Management Advisor ("AWMA"), 2020. The AWMA designation is issued by the College for Financial Planning ("CFFP"). The designation requirements are:
 - (a) Completion of course requirements set by the CFFP Board (www.cffp.edu). The course of study encompasses wealth strategies, equity-based compensation plans, tax reduction alternatives and asset protection alternatives.
 - (b) Pass the AWMA exam.
 - (c) Adherence to the CFFP Standards of Professional Conduct and subject to a disciplinary process.
 - (d) Designation subject to renewal every two years by completing sixteen hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Business Experience:

- Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Financial Life Advisor, Telemus Capital, LLC, 2020 to 2024
- Associate Financial Life Advisor, Telemus Capital, LLC, 2019 to 2020
- Private Wealth Analyst, BMO Private Bank, 2017 to 2019

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Andrew D. Hambleton is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Hambleton is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Hambleton. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Andrew D. Hambleton is supervised by Steve Putzel, Principal, Regional Practice Leader. He reviews Mr. Hambleton's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Trever M. Helmstead** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Trever M. Helmstead** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Trevor M. Helmstead

Date of Birth: 1980

Educational Background:

- Masters in Business Administration, University of Michigan, 2007
- Masters of Science in Finance, University of Michigan, 2007
- Bachelor of Arts in Economics, University of Michigan, 2002

Professional Designation:

- Certified Financial Planner (CFP), 2021. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.
- Chartered Financial Analyst (CFA), 2004. CFA charters are awarded by the CFA Institute. To earn the CFA charter candidates must:
 - (a) Pass three sequential, six-hour examinations. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.
 - (b) Have at least four years of qualified professional experience.
 - (c) Join CFA Institute as members.
 - (d) Commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Business Experience:

- Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2020 to Present
- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Financial Life Advisor, Telemus Capital, LLC, 2019 to 2024
- Investment Officer, Bank of Ann Arbor, 2016 to 2019
- Vice President, Wealth Management Product Manager, Comerica Securities, Inc. 2014 to 2016

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Trever M. Helmstead is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Helmstead is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Helmstead. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Trever M. Helmstead is supervised by Adam Pawloski, Principal, Senior Wealth Advisor. He reviews Mr. Helmstead's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Robert Hochkins** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Robert Hochkins** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Robert Hochkins

Date of Birth: 1988

Educational Background:

- Bachelor of Science in Business Administration, Central Michigan University, 2010

Professional Designation:

- Accredited Wealth Management Advisor (“AWMA”), 2016. The AWMA designation is issued by the College for Financial Planning (“CFFP”). The designation requirements are:
 - (a) Completion of course requirements set by the CFFP Board (www.cffp.edu). The course of study encompasses wealth strategies, equity-based compensation plans, tax reduction alternatives and asset protection alternatives.
 - (b) Pass the AWMA exam.
 - (c) Adherence to the CFFP Standards of Professional Conduct and subject to a disciplinary process.
 - (d) Designation subject to renewal every two years by completing sixteen hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Business Experience:

- Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2023 to Present
- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Financial Life Advisor, Telemus Capital, LLC, 2020 to 2024
- Associate Financial Life Advisor, Telemus Capital, LLC, 2017 to 2020

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Robert Hochkins is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Hochkins is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Hochkins. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Robert Hochkins is supervised by Adam M. Pawloski, Principal, Senior Wealth Advisor. He reviews Mr. Hochkins' work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Ruth Y. Impastato** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Chief Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Ruth Y. Impastato** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Ruth Y. Impastato

Date of Birth: 1999

Educational Background:

- Bachelor of Science in Business Administration, Wayne State University, 2022

Business Experience:

- Associate Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Associate Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital Division, 2024
- Associate Support Specialist, Telemus Capital, LLC, 2023 to 2024
- Internship, Sentinel Benefits, 2022
- Beverage Cart Attendant, Tanglewood Golf Course, 2019 to 2022
- Student, Wayne State University, 2019 to 2022
- Pharmacy Technician, Kroger, 2019

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

Ruth Y. Impastato is supervised by Adam M. Pawloski, Principal, Senior Wealth Advisor. He reviews Ms. Impastato's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Natalie F. Langnas** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Natalie F. Langnas** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Natalie F. Langnas

Date of Birth: 1997

Educational Background:

- Master of Management, University of Michigan – Ross School of Business, 2020
- Bachelor of Arts in Economics and Organization Studies, University of Michigan, 2019

Business Experience:

- Associate Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2023 to Present
- Associate Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Associate Financial Life Advisor, Telemus Capital, LLC, 2021 to 2024
- Client Service Manager, Telemus Capital, LLC, 2021
- Independent Contractor, Yum! Brands, 2020
- Event Management Intern, ORT America, 2018
- Capital Markets Analyst, Quicken Loans, 2017
- Summer Camp Counselor, Tamarack Camps, 2016

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Natalie F. Langnas is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Ms. Langnas is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Ms. Langnas. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to

meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Natalie F. Langnas is supervised by Adam M. Pawloski, Principal, Senior Wealth Advisor. He reviews Ms. Langnas' work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Joshua S. Levine** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Joshua S. Levine** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Joshua S. Levine

Date of Birth: 1978

Educational Background:

- Bachelor of Arts in Psychology, University of Texas, 2000
- Master of Business Administration, Emory University, 2005

Professional Designation:

- Certified Financial Planner (CFP), 2010. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.

Business Experience:

- Principal and Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2013 to Present
- Senior Financial Life Advisor and Partner, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Senior Financial Life Advisor and Partner, Telemus Capital, LLC, 2015 to 2024

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Joshua S. Levine is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Levine is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Levine. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Joshua S. Levine is supervised by Mike Blehar, Principal, National Practice Management Leader. He reviews Mr. Levine's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Facsimile: 248-827-1808

www.telemus.com

eoppenheim@telemus.com

Item 1: This brochure supplement provides information about **Thomas A. Munoz** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Thomas A. Munoz** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Thomas A. Munoz

Date of Birth: 1996

Educational Background:

- Bachelor of Science in Business Administration, Central Michigan University, 2018

Business Experience:

- Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, 2019 to Present
- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Financial Life Advisor, Telemus Capital, LLC, 2022 to 2024
- Associate Financial Life Advisor, Telemus Capital, LLC, 2019 to 2022
- Financial Consultant, AXA Advisors, LLC, 2019
- Intern, AXA Advisors, LLC, 2018
- Telemarketer, Annual Giving Central Michigan University, 2018

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Thomas A. Munoz is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Munoz is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Munoz. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Thomas A. Munoz is supervised by Adam M. Pawloski, Principal, Senior Wealth Advisor. He reviews Mr. Munoz's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Adam M. Pawloski** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Adam M. Pawloski** is available on the SEC's website at www.adviserinfo.sec.gov

April 1, 2025

Item 2: Educational Background and Experience

Name: Adam M. Pawloski

Date of Birth: 1985

Educational Background:

- Bachelor of Business Management, University of Michigan – Dearborn, 2007

Professional Designation:

- Certified Financial Planner (CFP), 2014. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.

Business Experience:

- Principal and Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2015 to Present
- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Financial Life Advisor, Telemus Capital, LLC, 2016 to 2024
- Financial Life Analyst, Telemus Capital, LLC, 2015 to 2016

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Adam M. Pawloski is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Pawloski is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Pawloski. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Adam M. Pawloski is supervised by Ludgy Lilavosi, Principal, Regional Practice Leader and Joshua Levine, Principal and Senior Wealth Advisor. They review Mr. Pawloski's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Charlene G. Reardon** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment advisor with the Securities and Exchange Commission (SEC).

Additional information about **Charlene G. Reardon** is available on the SEC's website at www.adviserinfo.sec.gov

April 1, 2025

Item 2: Educational Background and Experience

Name: Charlene G. Reardon

Date of Birth: 1961

Educational Background:

- Masters of Corporate Finance, Walsh College, 1999
- Bachelor of Science in Business, Central Michigan University, 1983

Professional Designation:

- Accredited Wealth Management Advisor (“AWMA”), 2013. The AWMA designation is issued by the College for Financial Planning (“CFFP”). The designation requirements are:
 - (a) Completion of course requirements set by the CFFP Board (www.cffp.edu). The course of study encompasses wealth strategies, equity-based compensation plans, tax reduction alternatives and asset protection alternatives.
 - (b) Pass the AWMA exam.
 - (c) Adherence to the CFFP Standards of Professional Conduct and subject to a disciplinary process.
 - (d) Designation subject to renewal every two years by completing sixteen hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Business Experience:

- Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Senior Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Senior Financial Life Advisor, Telemus Capital, LLC, 2015 to 2024

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

Charlene G. Reardon is supervised by Steve Putzel, Principal, Regional Practice Leader. He reviews Ms. Reardon's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Robert A. Stone** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment advisor with the Securities and Exchange Commission (SEC).

Additional information about **Robert A. Stone** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Robert A. Stone

Date of Birth: 1963

Educational Background:

- Bachelor of Arts in Economics, University of Michigan, 1985

Business Experience:

- Principal and Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Senior Financial Life Advisor and Partner, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Senior Financial Life Advisor and Partner, Telemus Capital, LLC, 2015 to 2024

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

Robert A. Stone is supervised by Mike Blehar, Principal, National Practice Management Leader. He reviews Mr. Stone's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Thomas E. Uber** that supplements the Kovitz Investment Group Partner's, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment advisor with the Securities and Exchange Commission (SEC).

Additional information about **Thomas E. Uber** is available on the SEC's website at www.adviserinfo.sec.gov

April 1, 2025

Item 2: Educational Background and Experience

Name: Thomas E. Uber

Date of Birth: 1955

Educational Background:

- Northern Michigan University, 1974 - 1977

Business Experience:

- Municipal Bonds Portfolio Manager, Kovitz Investment Group Partners, LLC, 2025 to Present
- Municipal Bonds Portfolio Manager, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Municipal Bonds Portfolio Manager, Telemus Capital, LLC, 2015 to 2024
- Portfolio Manager, Telemus Capital, LLC, 2013 to 2015

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

Thomas E. Uber is supervised by Jesse Stumpf, Director, Fixed Income. He reviews Mr. Uber's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Kirill Vorobeychik** that supplements the Kovitz Investment Group Partner's, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Kirill Vorobeychik** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Kirill Vorobeychik

Date of Birth: 1975

Educational Background:

- Bachelor of Arts, Kharkov State University, 1996

Business Experience:

- Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2024 to Present
- Senior Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Senior Financial Life Advisor, Telemus Capital, LLC, 2024 to 2024
- Chief Executive Officer & Founder, Ketoret Capital, 2022 to 2023
- Financial Advisor-Senior Vice President, Merrill Lynch, 2007

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Kirill Vorobeychik is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Vorobeychik is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Vorobeychik. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Kirill Vorobeychik is supervised by Mike Blehar, Principal, National Practice Management Leader. He reviews Mr. Vorobeychik's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **William A. Wallbank** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment advisor with the Securities and Exchange Commission (SEC).

Additional information about **William A. Wallbank** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: William A. Wallbank

Date of Birth: 1984

Educational Background:

- Bachelor of Science, Wayne State University, 2012

Business Experience:

- Senior Portfolio Investment Analyst, Kovitz Investment Group Partners, LLC, 2025 to Present
- Senior Portfolio Investment Analyst, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Senior Portfolio Investment Analyst, Telemus Capital, LLC, 2023 to 2024
- Senior Portfolio Analyst/Trader, Telemus Capital, LLC, 2021 to 2022
- Fixed Income Trader and Portfolio Analyst, Telemus Capital, LLC, 2017 to 2021
- Financial Life Analyst, Telemus Capital, LLC, 2015 to 2017
- Wealth Analyst, Telemus Capital, LLC, 2013 to 2015

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Not Applicable.

Item 6: Supervision

William A. Wallbank is supervised by Jesse L. Stumpf, Director, Fixed Income. He reviews Mr. Wallbank's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Lyle M. Wolberg** that supplements the Kovitz Investment Group Partners, LLC ("Kovitz") brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Lyle M. Wolberg** is available on the SEC's website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Lyle M. Wolberg

Date of Birth: 1969

Educational Background:

- Bachelor of Business Administration in Finance, University of Michigan, 1991

Professional Designation:

- Certified Financial Planner (CFP), 1998. Certified financial planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements are:
 - (a) Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
 - (b) Attain a bachelor's degree from a regionally accredited United States college or university.
 - (c) Pass the comprehensive CFP Certification Exam.
 - (d) Complete at least three years of full-time financial planning-related experience or the equivalent.
 - (e) Successfully pass the Candidate Fitness Standards and background check and agree to be bound by the CFP Board's Standards of Professional Conduct.
 - (f) Complete thirty hours of continuing education every two years.

Business Experience:

- Chief Executive Officer of Telemus Capital and Principal and Senior Wealth Advisor, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2013 to Present
- Chief Executive Officer of Telemus Capital and Senior Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Chief Executive Officer, Senior Financial Life Advisor and Partner, Telemus Capital, LLC, 2021 to 2024
- Senior Financial Life Advisor and Partner, Telemus Capital, LLC, 2015 to 2021

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Lyle M. Wolberg is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Mr. Wolberg is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Mr. Wolberg. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Lyle M. Wolberg is supervised by Mike Blehar, Principal, National Practice Management Leader. He reviews Mr. Wolberg's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.



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Item 1: This brochure supplement provides information about **Renee S. Wolgin** that supplements the Kovitz Investment Group Partners, LLC (“Kovitz”) brochure. You should have received a copy of that brochure. Please contact Eric C. Oppenheim, General Counsel and Compliance Officer, if you did not receive the Kovitz brochure or if you have any questions about the contents of this supplement. Mr. Oppenheim may be reached at (248) 827-0103 or eoppenheim@telemus.com. Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Renee S. Wolgin** is available on the SEC’s website at www.adviserinfo.sec.gov.

April 1, 2025

Item 2: Educational Background and Experience

Name: Renee S. Wolgin, CPA, CGMA

Date of Birth: 1977

Educational Background:

- Bachelor of Arts with a Major in Accountancy, Eli Broad College of Business, Michigan State University, 1999

Professional Designations:

- Certified Public Accountant (CPA), 2001. Certified public accountants are certified by the Michigan State Board of Public Accountancy. CPA certification requirements are:
 - (a) Bachelor's degree from an accredited academic institution recognized by the Michigan State Board of Public Accountancy.
 - (b) Minimum qualifying credit hours in accounting.
 - (c) Minimum qualifying credit hours in business administration.
 - (d) A total of 120 credit hour requirement.
- Chartered Global Management Accountant (CGMA), 2014. Chartered Global Management Accountants are licensed by the American Institute of Certified Public Accountants (AICPA). CGMA certification requirements are:
 - (a) Be an AICPA member in good standing.
 - (b) Provide evidence of relevant, work-based experience, demonstrating a minimum 36 months' practical experience across the four knowledge areas as defined by the CGMA Competency Framework: Technical Skills, Business Skills, People Skills and Leadership Skills.
 - (c) Certified public accountant license.

Business Experience:

- Director of Family Office, Kovitz Investment Group Partners, LLC, 2025 to Present
- Agent, Telemus Insurance Services, LLC, 2020 to Present
- Director, Family Office, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024
- Director, Family Office, Telemus Capital, LLC, 2020 to 2024
- Principal, Rubenfaer & Associates P.C., 2002-2019

Item 3: Disciplinary Information

Not Applicable.

Item 4: Other Business Activities

Not Applicable.

Item 5: Additional Compensation

Renee S. Wolgin is a licensed insurance agent of the firm's affiliate, Telemus Insurance Services, LLC ("TIS"). As such, Ms. Wolgin is entitled to receive a portion of the commissions received by TIS for the sale of insurance products to clients referred to TIS by Ms. Wolgin. The compensation creates an incentive to recommend insurance products for the compensation received, rather than to meet a client's needs. Clients are free to accept our recommendation or seek insurance products through other brokers or agents, as they wish.

Item 6: Supervision

Renee S. Wolgin is supervised by Catherine Goel, Principal, Head of Family Office Services. She reviews Ms. Wolgin's work through frequent office interactions, as well as through the firm's client relationship management system.

Item 7: Requirements for State-Registered Advisers

Not Applicable.