



**Firm Brochure Supplements**  
(Part 2B of Form ADV)

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

[www.telemus.com](http://www.telemus.com)

[eoppenheim@telemus.com](mailto:eoppenheim@telemus.com)

March 1, 2024



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(Part 2B of Form ADV)

**Kovitz Investment Group Partners, LLC**  
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Item 1: This brochure supplement provides information about **Brian P. Babcock** 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](mailto:eoppenheim@telemus.com). Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Brian P. Babcock** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 1, 2024

## **Item 2: Educational Background and Experience**

Name: Brian P. Babcock

Date of Birth: 1980

Educational Background:

- BS in Finance from Oakland University, 1999- 2003

Business Experience:

- Portfolio Manager, Kovitz Investment Group Partners, LLC – Telemus Capital Division, 2024 to Present
- Portfolio Manager, Telemus Capital, LLC, 2021 to 2024
- Senior Research Analyst, Telemus Capital, LLC, 2020 to 2021
- Director of Technology and Equity Trader, Telemus Capital, LLC, 2019 to 2020
- Equity Trader, Telemus Capital, LLC, 2013 to 2019

## **Item 3: Disciplinary Information**

Not Applicable.

## **Item 4: Other Business Activities**

Not Applicable.

## **Item 5: Additional Compensation**

Not Applicable.

## **Item 6: Supervision**

Brian P. Babcock is supervised by Matthew J. Dmytryszyn, Telemus Capital's Chief Investment Officer. He reviews Mr. Babcock's work through frequent office interactions, as well as through Telemus Capital'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 **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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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 Financial Life Advisor and Senior Portfolio Manager, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- 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 Joshua S. Levine, Telemus Capital's Senior Financial Life Advisor. He reviews Ms. Bakhaus' work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov)

March 1, 2024

## **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:

- Certified Public Accountant (CPA), 1977. 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.
- 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:

- Chief Wealth Officer of Telemus Capital, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- 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, Telemus Capital's Senior Financial Life Advisor. He reviews Mr. Bass's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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](http://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:

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2023 to Present
- 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**

Not Applicable.

**Item 6: Supervision**

Kyle Deal is supervised by Adam M. Pawloski, Telemus Capital's Financial Life Advisor. He reviews Mr. Deal's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## 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](http://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:

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2024 to Present
- Registered Representative, Lion Street Financial, LLC, 2022 to Present
- 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 FIG. Kovitz will not receive referral fees for the sales of these products and services under the above referral arrangement.

**Item 5: Additional Compensation**

Not applicable.

**Item 6: Supervision**

Ari Fischman is supervised by Lyle M. Wolberg, Telemus Capital's Chief Executive Officer. He reviews Mr. Fischman's work through frequent office interactions, as well as through Telemus Capital'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 D. Hambleton** 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 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](mailto: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 D. Hambleton** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 1, 2024

## Item 2: Educational Background and Experience

Name: Andrew D. Hambleton

Date of Birth: 1992

Educational Background:

- Bachelor of Science, Rollins College, 2014

Business Experience:

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

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](http://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](http://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.

### **Item 3: Disciplinary Information**

Not Applicable.

### **Item 4: Other Business Activities**

Not Applicable.

### **Item 5: Additional Compensation**

Not Applicable.

### **Item 6: Supervision**

Andrew D. Hambleton is supervised by Adam M. Pawloski, Telemus Capital's Financial Life Advisor. He reviews Mr. Hambleton's work through frequent office interactions, as well as through Telemus Capital'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 **Matthew Heckler** 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](mailto:eoppenheim@telemus.com). Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Matthew Heckler** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 1, 2024

## **Item 2: Educational Background and Experience**

Name: Matthew Heckler

Date of Birth: 1982

Educational Background:

- Juris Doctor, Seton Hall University School of Law, 2007
- Bachelor of Arts, University of Michigan, 2004

Business Experience:

- Director of Corporate Executive Services, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2021 to Present
- Director of Corporate Executive Services, Telemus Capital, LLC, 2020 to 2024
- Principal, Cerity Partners, 2017-2020
- Account Manager, The Ayco Company, A Goldman Sachs Company, 2007-2016

## **Item 3: Disciplinary Information**

Not Applicable.

## **Item 4: Other Business Activities**

Not Applicable.

## **Item 5: Additional Compensation**

Not Applicable.

## **Item 6: Supervision**

Matthew Heckler is supervised by Ari Fischman, Telemus Capital's Senior Financial Life Advisor. He reviews Mr. Heckler's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## Item 2: Educational Background and Experience

Name: Trever 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](http://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:

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2020 to Present
- 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**

Not Applicable.

**Item 6: Supervision**

Trever M. Helmstead is supervised by Joshua S. Levine, Telemus Capital's Senior Financial Life Advisor. He reviews Mr. Helmstead's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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](http://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:

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2023 to Present
- 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**

Not Applicable.

**Item 6: Supervision**

Robert Hochkins is supervised by Adam M. Pawlosi, Telemus Capital's Financial Life Advisor. He reviews Mr. Hochkins' work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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 – Telemus Capital Division, 2024 to Present
- 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, Telemus Capital's Financial Life Advisor. He reviews Ms. Impastato's work through frequent office interactions, as well as through Telemus Capital's client relationship management system.

## **Item 7: Requirements for State-Registered Advisers**

Not Applicable.



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[eoppenheim@telemus.com](mailto:eoppenheim@telemus.com)

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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **Item 2: Educational Background and Experience**

Name: Natalie F. Langanas

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 Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2023 to Present
- 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**

Not Applicable.

**Item 6: Supervision**

Natalie F. Langnas is supervised by Adam M. Pawloski, Telemus Capital's Financial Life Advisor. He reviews Ms. Langnas' work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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](http://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:

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

Joshua S. Levine is supervised by Lyle M. Wolberg, Telemus Capital's Chief Executive Officer and Senior Financial Life Advisor. He reviews Mr. Levine's work through frequent office interactions, as well as through Telemus Capital'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 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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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:

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, 2019 to Present
- 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**

Not Applicable.

## **Item 6: Supervision**

Thomas A. Munoz is supervised by Adam M. Pawloski, Telemus Capital's Financial Life Advisor. He reviews Mr. Munoz's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov)

March 1, 2024

## **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](http://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:

- Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2015 to Present
- 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**

Not Applicable.

**Item 6: Supervision**

Adam M. Pawloski is supervised by Joshua S. Levine, Telemus Capital's Senior Financial Life Advisor. He reviews Mr. Pawloski's work through frequent office interactions, as well as through Telemus Capital'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 **Matthew Ran** 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](mailto:eoppenheim@telemus.com). Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Matthew Ran** is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 1, 2024

## **Item 2: Educational Background and Experience**

Name: Matthew Ran

Date of Birth: 1985

Educational Background:

- Bachelor of Economics, Wayne State University, 2013
- University of Southern California, 2005 - 2008
- London School of Economics, 2005
- Michigan State University, 2004 – 2005

Professional Designation:

- Accredited Wealth Management Advisor (“AWMA”), 2011. 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](http://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:

- Vice President of Marketing, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Chief Operating Officer, Telemus Capital, LLC, 2023 to 2024
- Chief Operating Officer and Partner, Telemus Capital, LLC, 2020 to 2022
- Chief Operating Officer, Telemus Capital, LLC, 2020
- Director of Growth and Development, Telemus Capital, LLC, 2019 to 2020
- Financial Life Advisor, Telemus Capital, LLC, 2015 to 2019

## **Item 3: Disciplinary Information**

Not Applicable.



**Item 4: Other Business Activities**

Not Applicable.

**Item 5: Additional Compensation**

Not Applicable.

**Item 6: Supervision**

Matthew Ran is supervised by Lyle M. Wolberg, Telemus Capital's Chief Executive Officer and Senior Financial Life Advisor. He reviews Mr. Ran's work through frequent office interactions, as well as through Telemus Capital'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 **Michael B. Ran** 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](mailto:eoppenheim@telemus.com). Telemus Capital is a division of Kovitz, a registered investment adviser with the Securities and Exchange Commission (SEC).

Additional information about **Michael B. Ran** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 1, 2024

## **Item 2: Educational Background and Experience**

Name: Michael B. Ran

Date of Birth: 1988

Educational Background:

- Bachelor of Arts in English Literature, University of Colorado at Boulder, 2011

Professional Designation:

- 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](http://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:

- Associate Financial Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2020 to Present
- Associate Financial Life Advisor, Telemus Capital, LLC, 2018 to 2024
- Chef, CookNSolo Restaurant Partners, 2016-2018
- Chef, Eataly New York, 2014-2016

## **Item 3: Disciplinary Information**

Not Applicable.

## **Item 4: Other Business Activities**

Not Applicable.

**Item 5: Additional Compensation**

Not Applicable.

**Item 6: Supervision**

Michael B. Ran is supervised by Adam M. Pawloski, Telemus Capital's Financial Life Advisor. He reviews Mr. Ran's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov)

March 1, 2024

## **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](http://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 Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- 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 Joshua S. Levine, Telemus Capital's Senior Financial Life Advisor. He reviews Ms. Reardon's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024



## **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:

- Senior Financial Life Advisor and Partner, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- 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 Lyle M. Wolberg, Telemus Capital's Chief Executive Officer, Senior Financial Life Advisor. He reviews Mr. Stone's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov)

March 1, 2024

## **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 – Telemus Capital division, 2024 to Present
- 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 Matthew J. Dmytryszyn, Telemus Capital's Chief Investment Officer. He reviews Mr. Uber's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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 Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2024 to Present
- 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**

Not Applicable.

## **Item 6: Supervision**

Ari Fischman is supervised by Joshua S. Levine, Telemus Capital's Senior Financial Life Advisor. He reviews Mr. Fischman's work through frequent office interactions, as well as through Telemus Capital'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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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 – Telemus Capital division, 2024 to Present
- 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 Matthew J. Dmytryszyn, Telemus Capital's Chief Investment Officer. He reviews Mr. Wallbank's work through frequent office interactions, as well as through Telemus Capital's client relationship management system.

## **Item 7: Requirements for State-Registered Advisers**

Not Applicable.



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[eoppenheim@telemus.com](mailto:eoppenheim@telemus.com)

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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024



## **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](http://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 Senior Financial Life Advisor, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2013 to Present
- 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**

Lyle M. Wolberg serves on the Boards of Directors of Sterling Bancorp, Inc. ("Sterling") and its wholly owned subsidiary, Sterling Bank & Trust FSB. He also serves on various board committees of both entities. There is no business relationship between Telemus Capital and these entities. Since Sterling is a publicly traded company, Telemus Capital has put in place policies and procedures to address any potential conflicts of interest with its clients. These include, but are not limited to, placing Sterling on its restricted list and prohibiting any trading in Sterling securities by Telemus Capital and its employees, individually and in client accounts.

#### **Item 5: Additional Compensation**

Not Applicable.

#### **Item 6: Supervision**

Lyle M. Wolberg is Telemus Capital's Chief Executive Officer and Senior Financial Life Advisor. Telemus Capital has policies and procedures in place which govern Mr. Wolberg's activities, including the investment advice he provides to clients.

#### **Item 7: Requirements for State-Registered Advisers**

Not Applicable.



**Firm Brochure Supplement**  
(Part 2B of Form ADV)

**Kovitz Investment Group Partners, LLC**  
**dba Telemus Capital**

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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](mailto: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](http://www.adviserinfo.sec.gov).

March 1, 2024

## **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, Family Office, Kovitz Investment Group Partners, LLC – Telemus Capital division, 2024 to Present
- Agent, Telemus Insurance Services, LLC, 2020 to Present
- 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**

Not Applicable.

**Item 6: Supervision**

Renee S. Wolgin is supervised by Ari Fischman, Telemus Capital's Senior Financial Life Advisor. He reviews Ms. Wolgin's work through frequent office interactions, as well as through Telemus Capital'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 D. Young** 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](mailto: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 D. Young** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 1, 2024

## **Item 2: Educational Background and Experience**

Name: Robert D. Young

Date of Birth: 1981

Educational Background:

- Masters in Business Administration, 2005

Professional Designation:

- Chartered Financial Analyst (CFA), 2013. CFA charters are awarded by the CFA Institute. To earn the CFA charter candidates must:
  - (a) Pass three sequential, approximately 4.5-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 4,000 hours of qualified work experience completed over a 36-month period.
  - (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.
- Chartered Alternative Investment Analyst (CAIA). 2023. The CAIA designation is a professional designation offered by the CAIA Association. CAIA is the globally-recognized credential for professionals managing, analyzing, distributing or regulating alternative investments. To earn the designation candidates must:
  - (a) Complete a course of study and pass two examinations.
  - (b) Maintain membership in the CAIA Association.
  - (c) Adhere to professional and ethical standards.

Business Experience:

- Senior Investment Analyst, Kovitz Investment Group Partners – Telemus Capital division, 2024 to Present
- Senior Investment Analyst, Telemus Capital, LLC, 2022 to 2024
- Investment Analytical and Strategy Specialist/Senior Investment Strategy Specialist, Calamos Wealth Management, 2019 to 2022
- Research Analyst/Portfolio Manager, Icon Advisors, 2015 to 2019

## **Item 3: Disciplinary Information**

Not Applicable.

**Item 4: Other Business Activities**

Not Applicable.

**Item 5: Additional Compensation**

Not Applicable.

**Item 6: Supervision**

Robert Young is supervised by Matthew Dmystryszyn, Telemus Capital's Chief Investment Officer. He reviews Mr. Young's work through frequent office interactions, as well as through Telemus Capital's client relationship management system.

**Item 7: Requirements for State-Registered Advisers**

Not Applicable.