

## **FORM ADV Part 2B**

### **Brochure Supplement for Anna C. Nelson**

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**This brochure supplement provides information about Anna C. Nelson  
that supplements the Ely Prudent Portfolios, LLC brochure.**

**You should have received a copy of that brochure.**

**Please contact Anna C. Nelson if you did not receive  
Ely Prudent Portfolios, LLC's brochure  
or if you have any questions about the contents of this supplement.**

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

**You can search this site by a unique identifying number,  
known as a CRD number.**

**The CRD number for Anna C. Nelson is 5019421.**

Name of Investment Adviser: Ely Prudent Portfolios, LLC  
Address: 40 Philadelphia Drives, Suite 101, Chico, CA 95973  
Website: <http://www.elyportfolios.com>  
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This part of Form ADV gives information about the investment adviser and its business for the use of clients.  
This information has not been approved or verified by any governmental authority.

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

### **Anna C. Nelson**

- Born in 1980
- B.S. Recreation Administration, California State University, Chico
- Certified Specialist in Planned Giving, American Institute for Philanthropic Studies
- 1/2011 to Present – Ely Prudent Portfolios
- 3/2009 to 12/2010 – Ameriprise Financial, Assistant Advisor
- 11/2006 to 12/2009 – Ely Prudent Portfolios
- 8/2005 to 10/2006 – Prudent Investor Advisors
- 11/2004 to 7/2005 – Wachovia Bank, Assistant Branch Manager
- 2/2004 to 8/2004 – Hyatt Hotels, Manager

### **Certified Specialist in Planned Giving Explanation**

The American Institute for Philanthropic Studies' CSPG<sup>CM</sup> program is the only program that offers the Certified Specialist in Planned Giving designation. There are six courses that must be completed and below describes what is covered in the courses.

- Evaluate individual situations and recommend the best planned giving techniques in concert with the client's goals and objectives
- How charitable techniques can enhance basic and advanced estate planning
- How to minimize taxes and optimize income
- The interplay of gift modeling and importance of investment management
- The role of gift planning in estate planning
- How to formulate and execute a marketing proposal
- How to select effective internal gift arrangements
- How to determine the cost-effectiveness of a planned giving program
- How to build a strong administrative team to deal effectively with a diverse range of organizational challenges

## ***Item 3. Disciplinary Information.***

Anna Nelson has not been involved in, nor had any convictions for, theft, fraud, bribery, perjury, forgery, counterfeiting, extortion or violations of securities laws.

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

Anna Nelson is not actively engaged in any other business than giving investment advice. Anna Nelson is not engaged in other financial industry activities or affiliations.

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### ***Item 5. Additional Compensation***

Anna Nelson does not receive any economic benefit, such as sales awards, travel or other prizes or compensation other than fees regular fees charged as outlined in ADV 2A for investment advisory services.

Anna Nelson does NOT directly or indirectly compensate any person for client referrals.

### ***Item 6. Supervision***

All EPP advisers are required to adhere to a passive asset allocation strategy that is implemented with low cost index or asset class funds, whenever possible. For those clients that EPP provides ongoing money management and investment advice, supervised advisers are required to prepare written investment policy statements and/or other guidelines that are reviewed and approved by the supervising person. For other advising clients, advisers are required to provide advice in writing that is reviewed and approved by the supervising person.

Anna C. Nelson is a registered investment advisor under the supervision of Guerdon T. Ely, the owner and principal of EPP. Anna's phone number is 307-256-6931; her email is [anna@elyportfolios.com](mailto:anna@elyportfolios.com). Guerdon Ely's phone number is (530) 895-0636; his email address is [gtely@elyportfolios.com](mailto:gtely@elyportfolios.com).

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

Anna C. Nelson has never been the subject of a bankruptcy petition nor has she ever been involved in any of the following events:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.