

## **MICHAEL SHEA**

108 N. Payne Street, 2nd Floor  
Alexandria, VA 22314  
(703) 519-0962

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

Born 1966

#### **Post-Secondary Education**

New York University, Stern School of Business | MBA, Finance and Accounting | 1994

University of Colorado | BS, Finance | 1988

#### **Recent Business Background**

8th Street Investments, LLC | Managing Member | October 2008 - Present

U.S. Trust Company | Senior Portfolio Manager | February 1991 – September 2008

#### **Professional Designation**

Michael Shea holds the professional designation of Chartered Financial Analyst (“CFA”). The CFA® charter is a credential awarded by the CFA Institute to individuals who meet its education, examination, sponsorship, experience and ethics requirements. To earn a CFA® charter, eligible candidates must have four years of qualified investment work experience, become a member of the CFA Institute, adhere to the Code of Ethics and Standards of Professional Conduct on an ongoing basis, and complete the CFA® program, which requires the passage of three separate six-hour examinations. Topics tested by the CFA Institute include ethical standards, quantitative methods, economics, financial reporting, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management.

For additional information about this credential, please refer directly to the website of the organization that issues the designation.

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

8th Street is required to disclose the pertinent facts regarding any legal or disciplinary events material to a client’s evaluation of Michael Shea. 8th Street does not have any information to disclose in relation to this Item.

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

8th Street is required to disclose information regarding any investment-related business or occupation in which Michael Shea is actively engaged. 8th Street does not have any information to disclose in relation to this Item.

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

8th Street is required to describe any arrangement under which Michael Shea receives an economic benefit for providing advisory services from someone that is not a client of 8th Street. 8th Street has no information to disclose in relation to this Item.

This Brochure Supplement provides information about Lisa Pendley that supplements the Disclosure Brochure of 8th Street Investments, LLC (hereinafter “8th Street”), a copy of which you should have received. Please contact 8th Street’s Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Michael Shea is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **Item 6. Supervision**

Lisa Pendley, Managing Member, is generally responsible for supervising Michael Shea's advisory activities on behalf of 8th Street. The telephone number to reach Lisa Pendley is (703) 519-0962.

8th Street supervises its personnel and the investments made in client accounts. 8th Street monitors the investments recommended by Michael Shea to ensure those investments are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. 8th Street periodically reviews the advisory activities of Michael Shea, which may include reviewing individual client accounts and correspondence (including e-mails) sent to and received by Michael Shea.

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

Michael Shea has no additional disclosures to make under this Item.