

**Brochure Supplement**  
**(Provided Under Part 2B of Form ADV)**  
**March 2013**

Theodore Tilles, CFP®

**NORTH BERKELEY INVESTMENT PARTNERS, LLC**

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*This brochure supplement provides information about Theodore ("Ted") Tilles that supplements our brochure. You should have received a copy of that brochure. Please contact S. Katherine ("Kate") Campbell, Chief Compliance Officer, if you did not receive North Berkeley Investment Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

## EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Theodore Tilles**

**Date of Birth: June 7, 1972**

### **Educational Background:**

- Washington University; AB; 1983

### **Business Background:**

- North Berkeley Investment Partners, LLC – Member, Financial Planning Director, Investment Advisor Representative, July 2005 to present.
- Protected Investors of America – Registered Representative, March 2005 to July 2005
- Charles Schwab, Inc. – Senior Manager, March 1999 to March 2005
- Start Up – Program Director, November 1997 to March 1999
- Cambridge Systematics – Senior Analyst, August 1994 to November 1997

### **Professional Designations:**

- CFP® - CERTIFIED FINANCIAL PLANNER™



**Ted Tilles, CFP®**

Ted is a Partner of the firm. Prior to joining the firm in 2005, Ted was a Senior Manager in the Schwab Institutional division of Charles Schwab, ran a program aimed at small business development, and performed economic research for a consulting firm. Ted has been a Partner of the firm since 2011.

Ted completed the Personal Financial Planning certificate program at U.C. Berkeley in 2005, and is a Certified Financial Planner™ Ted is a member of the San Francisco chapter of the Financial Planning Association.

Ted received his A.B. in Economics and Spanish from Washington University. He lives in the Mission district of San Francisco with his wife Naomi and school-aged daughters.



He enjoys swimming in the Bay, riding and fixing bicycles, and his family. To read more about Ted and his bicycling time with his family, visit [www.sfbike.org/main/bike-commuting-is-easy-with-kiko-isabel-naomi-and-ted/](http://www.sfbike.org/main/bike-commuting-is-easy-with-kiko-isabel-naomi-and-ted/).

**CFP® - CERTIFIED FINANCIAL PLANNER™:**

The Certified Financial Planner™, CFP® and federally registered CFP marks are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

## **DISCIPLINARY INFORMATION**

Ted Tilles has not been subject to any disciplinary actions through his affiliation with North Berkeley Investment Partners, LLC as regulated by the Securities and Exchange Commission (SEC).

## **OTHER BUSINESS ACTIVITIES**

Ted does not have any other business activities to disclose.

## **ADDITIONAL COMPENSATION**

Ted does not receive economic benefits from a non-client for providing advisory services.

## **SUPERVISION**

S. Katherine ("Kate") Campbell, Chief Compliance Officer of North Berkeley, supervises and monitors Ted's activities on a regular basis. Kate reviews all outgoing correspondence for written financial advice that Ted provides to his clients. Please contact Kate if you have any questions about Ted brochure supplement at (510) 528-5820.