



**Thomas Holt**

**INNOVATION PARTNERS LLC**

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This Brochure provides information about the advisory personnel on whom you may rely for investment advice. Please contact IPLLC if you did not receive our Brochure (ADV Part 2A) or if you have any questions about the contents of this supplement. Additional information about IPLLC or advisory personnel is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

**Advisory Personnel**

Thomas Holt

CRD#: 2220527

## Innovation Partners LLC: Form ADV, Part 2B Thomas Holt

### Item 2- Educational Background and Business Experience

#### Thomas Holt

Date of Birth: January 20, 1949

Union College, Schenectady, New York, Bachelor of Arts, major in Philosophy: graduation June 1971

Thomas Holt is an Investment Advisor Representative in the state of Connecticut. He passed the FINRA Series 6, and 63, 65, exams

#### Business Background:

Innovation Partners LLC – 08/2010 to Present – Managing Director  
Confluent Solution Group, LLC – 01/2012 to present – President and Chief Marketing Officer  
Holt Financial Partners – 10/2009 to 08/2010 – Principal  
First Legacy Partners, LLC – 05/2009 to 10/2009 – Executive Vice President  
TIAA CREF New York – 02/2005 to 05/2009 – Vice President

### Item 3 – Disciplinary Information

Registered advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item.

### Item 4 – Other Business Activities

Thomas Holt is an investment advisor representative with Innovation Partners LLC.

### Item 5 – Additional Compensation

Registered Investment Advisors are required to disclose if the supervised person received an economic benefit from someone who is not a client for providing advisory services. No information is applicable to this item.

### Item 6 – Supervision

The supervised person is monitored by the Chief Compliance Officer (CCO) through periodic sampling of archived emails, mandatory compliance meetings and ongoing review of marketing materials. The CCO is Patrick Sutherland.

### Item 7 – Requirement for State Registered Advisors

Registered Investment Advisors are required to disclose whether the supervised person has been involved in any events related or otherwise being found liable to arbitration claims alleging damages in excess of \$2,500.00, civil or self-regulatory organization or administrative proceedings involving: investment or investment related activity, fraud, false statement (s) or omissions, theft, embezzlement, wrongful taking of property, bribery, forgery, counterfeiting, extortion, dishonest, unfair and unethical practices. No information is applicable to this item.

Registered Investment Advisors are required to disclose whether the supervised person has been the subject of a bankruptcy petition. No information is applicable to this item.