



# ARCUS

CAPITAL PARTNERS

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Atlanta, GA 30305***

***404.949.2111***

***[www.arcuscp.com](http://www.arcuscp.com)***

## ***Disclosure Brochure***

***December 1, 2013***

This brochure provides information about the qualifications and business practices of Arcus Capital Partners, LLC. If you have any questions about the contents of this brochure, please contact us at 404.949.2111. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Arcus Capital Partners, LLC is a registered investment adviser. Registration of an investment adviser does not imply any level of skill or training. Additional information about Arcus Capital Partners, LLC also is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

## Material Changes

The last annual update of Arcus Capital Partners, LLC's ("Arcus, we, us, our, ours") Disclosure Brochure was dated March 12, 2012. Between that date and our February 25, 2013 annual amendment, we made the following material changes to our business and our brochure:

- We have expanded our disclosure concerning other Financial Industry Activities and Affiliations to include the selection of other advisers.
- We have expanded our disclosure regarding Client Referrals and Other Compensation.
- We now accept nondiscretionary accounts on a limited basis.
- We now vote proxies for certain ERISA accounts.

Arcus is required to send a summary of any material changes to our brochures to our clients ("you, your, yours") by April 29th of each year. We may also

provide updated disclosure information about material changes on a more frequent basis. Any summaries of changes include the date of our last annual update of our brochure.

The most current version of our brochure may be requested by contacting Steve Sloan, Chief Compliance Officer at 404.949.2115 or [steve.sloan@arcuscp.com](mailto:steve.sloan@arcuscp.com). We will provide you with our brochure at any time without charge.

Additional information about our company is available via the United States Securities and Exchange Commission's ("SEC") website: [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

The SEC's website also provides information about any persons affiliated with Arcus who are registered as our investment adviser representatives ("your advisory representative"). Information on our investment adviser representatives who work with your account can also be found in our brochure supplements at the end of this brochure.

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## **Advisory Business**

Arcus is a Limited Liability Company organized under the laws of Georgia. The Atlanta-based investment advisory firm has been in business since September 2008. The ownership of Arcus Capital Partners, LLC is 82% in the following three principals via family entities controlled by them:

- Stephen S. Sloan
- Steven C. Edwards
- W. Ross Singletary

As of September 30, 2013, we managed approximately \$1.350 billion in client assets where we made all of the investment decisions (discretionary assets). An additional \$13.5 million is managed on a non-discretionary basis (where our clients made the investment decisions based upon our recommendations).

We provide investment advisory services utilizing a variety of resources, such as mutual funds, exchange traded funds (“ETFs”), hedge funds, limited partnerships and separate account management. The design of the allocation among these investments is determined by your circumstances as well as your risk tolerance.

The relationship begins with a data gathering and interview process designed to help us understand your goals, objectives, time horizon and risk tolerance. Depending on the specific nature of the service needed, we generally develop an investment plan that

is consistent with your desired rate of return, time horizon and risk tolerance. We consider such factors as:

- the size and source of the account,
- your identity and background,
- your income and growth objectives,
- income tax bracket, and
- your relative risk aversion.

Your active participation in the delivery of information and development of stated goals and objectives is expected. We can then design a portfolio or modify an existing one. You should notify us promptly if there are any changes in your financial situation or investment objectives or if you wish to impose any reasonable restrictions upon the management of your account.

In conjunction with the management of your account, we have also entered into agreements with unaffiliated investment managers (sub-advisers) for the provision of certain investment advisory services to you. We provide individualized investment advice to you through the selection of these advisers for a portion of your investment portfolio. Factors considered in the selection of these investment managers include:

- our personal preference for a particular portfolio manager or investment program;
- your risk tolerance, goals and objectives, as well as investment experience; and

- the amount of your assets available for investment.

## ***Fees and Compensation***

Broker-dealers that hold client accounts are referred to as custodians. The broker-dealer that acts as the custodian for your account determines the values of most of the assets in your portfolio.

To the extent that we include private investment funds owned by you on any supplemental account reports or billing statements prepared by us, the value(s) for all such private investment funds shall reflect either the initial purchase price and/or the most recent valuation provided by the fund sponsor. If the valuation reflects the initial purchase price (and/or a value as of a previous date), the current value(s) (to the extent ascertainable) could be significantly more or less than the original purchase price, thereby affecting your account value and advisory fee accordingly. We make every effort to obtain accurate and current pricing of your investments for reporting and billing purposes.

We offer our services on a fee-only basis. Fees for the initial quarter are based on the value of the actual inflows and outflows of your cash and securities as they are received by the custodian and are prorated in arrears based upon the number of calendar days in the calendar quarter that our agreement is in effect. At the same time you are billed for the initial quarter, you will pay for the

following quarter in advance. This fee is calculated based upon the market value of the assets in your account on the last day of the previous quarter. Following the end of each quarter thereafter, you will be billed in advance, less any pro rata adjustments for actual cash or securities inflow or outflows from the previous quarter.

Should either one of us terminate the advisory agreement we have entered into before the end of a billing period, any unearned fees that were deducted from your account will be returned to you by us. The amount refunded to you is calculated by dividing the most recent advisory fee you paid by the total number of days in the quarter. This daily fee is then multiplied by the number of calendar days in the quarter that our agreement was in effect. This amount, which equals the amount we earned for the partial quarter, is subtracted from the total fee you paid in advance to determine your refund.

Our annual fee schedule is described below:

<b><u>Assets Under Management</u></b>	<b><u>Advisory Fee<sup>1</sup></u></b>
First \$5,000,000	1.50%
Next \$5,000,000	1.00%
Next \$10,000,000	0.85%
Next \$30,000,000	0.70%
Next \$50,000,000	0.60%
Next \$100,000,000	0.50%

*<sup>1</sup>All fees are negotiable at our sole discretion. Such negotiations may be based upon account*

*size, scope and complexity of services, prior relationships and related account holdings.*

You must authorize us in writing to have the custodian pay us directly by charging your account. Your custodian provides you with statements that show the amount paid directly to us. You should verify the calculation of our fees. Your custodian does not verify the accuracy of fee calculations.

In addition to our fee, you may be required to pay other charges such as:

- custodial fees,
- brokerage commissions,
- transaction fees,
- SEC fees,
- fees and expenses of third-party sub-advisers,
- internal fees and expenses charged by mutual funds or exchange traded funds (“ETFs”), and
- other fees and taxes on brokerage accounts and securities transactions.

You may refer to the section entitled “Brokerage Practices” for additional information about securities trading in your account.

Compensation for unaffiliated investment management generally consists of four elements:

- management and advisory fees shared by us and our employees (in accordance with the fee schedule presented above);
- management fees paid to the unaffiliated investment manager;

- transaction costs (if applicable) which may be paid to purchase and sell such securities; and
- custody fees (if applicable).

A complete description of the programs and services provided, including:

- the amount of total fees,
- the payment structure,
- termination provisions and
- other aspects of each program

are detailed and disclosed in:

- the unaffiliated investment adviser’s disclosure brochure and
- the unaffiliated investment manager’s account opening documents.

A copy of all relevant disclosure documents of the unaffiliated investment adviser (sub-adviser) will be provided to anyone interested in these programs or managers.

## **Performance-Based Fees**

Performance-based fees are designed to give a portion of the returns of an investment to the investment adviser as a reward for positive performance. The fee is generally a percentage of the profits made on the investments.

We may charge performance-based fees on certain short-term oriented accounts for qualified clients only. These accounts are structured to target a defined return over a short period of time. If the targeted return is reached as provided for in the client agreement, we receive a fee which is negotiated on a case-by-case

basis. If the targeted return is not met, we do not receive compensation for management of the account.

We may also share in the performance-based fees charged by sub-advisers we may select for your account. These fees will be described in detail and disclosed in the sub-adviser's disclosure brochure and account opening documents.

### ***Types of Clients***

We provide advisory services primarily to high net worth individuals, as well as, pension and profit sharing plans. As a condition for starting and maintaining an advisory relationship, we generally require a minimum portfolio size of \$1,000,000.

We, at our sole discretion, may accept clients with smaller portfolios based upon certain factors including:

- anticipated future earning capacity,
- anticipated future additional assets,
- account composition,
- related accounts, and
- pre-existing client relationships.

We may consider the portfolios of your family members to determine if your portfolio meets the minimum size requirement.

### ***Methods of Analysis, Investment Strategies and Risk of Loss***

We employ a specific process in constructing a portfolio of unaffiliated investment advisers, funds and/or ETFs based on your individual investment objectives and risk tolerances. We begin the portfolio construction process by screening the universe of funds and managers using qualitative inputs such as:

- strategies,
- assets under management,
- internal expenses,
- identifying managers who commit significant personal funds to their own strategy, and
- manager tenure.

And quantitative inputs based on:

- historical returns,
- volatility of returns,
- variance of returns,
- value added by managers, and
- the strategy's sensitivity to broad market movements.

Actual fund or manager selection and portfolio weighting of each asset is determined by how each strategy is expected to contribute to portfolio returns, in addition to our outlook for asset classes and investment strategies.

Funds and managers are continuously monitored and can be removed from accounts for a number of reasons.

Reasons for elimination may include:

- underperformance of the manager vs. peers or expectations,

- identification of lower internal costs,
- an increase in volatility of a manager's returns,
- an unwanted change or drift in strategy, or
- a change in management.

Our investment strategies may include long-term and short-term purchases, trading (securities sold within 30 days), and the use of options, margin, and short sales. You may place reasonable restrictions on the strategies to be employed in your portfolio and the types of investments to be held in your portfolio.

All investments involve risks that can result in loss:

- loss of principal,
- a reduction in earnings (including interest, dividends and other distributions), and
- the loss of future earnings.

Additionally, these risks may include:

- market risk,
- interest rate risk,
- issuer risk, and
- general economic risk.

Although we manage your portfolio in a manner consistent with your risk tolerances, we cannot guarantee that our efforts will be successful. You should be prepared to bear the risk of loss.

You must also be aware that the use of margin, options and short sales are higher risk strategies. It is possible to

lose all of the principal you invest, and sometimes more. In a cash account, your risk is limited to the amount of money that you have invested. In a margin account, your risk includes the amount of money invested plus the amount that has been loaned to you. When you short sell, your losses can be infinite.

### ***Disciplinary Information***

We have not been the subject of any legal or disciplinary events that would be material to your evaluation of our business or the integrity of our management.

### ***Other Financial Industry Activities and Affiliations***

We have no relationships or arrangements with other related financial entities that are material to our advisory business or to you as our client.

We do occasionally recommend another investment adviser when their investment strategy is suitable for your account. If you establish an investment advisory relationship with this firm, we share in the advisory fees you pay to the firm. Arrangements of this nature are considered to present a conflict of interest because it creates an incentive to make recommendations based upon the amount of compensation an adviser receives rather than based upon a client's needs. We explain the specific costs associated with any recommended investments or unaffiliated advisers, and

believe we make these recommendations in your best interest.

### ***Code of Ethics, Participation or Interest in Client Transactions and Personal Trading***

We have adopted a Code of Ethics (“Code”) to address the securities-related conduct of our advisory representatives and employees. The Code includes our policies and procedures developed to protect your interests in relation to the following:

- the duty at all times to place your interests ahead of ours;
- that all personal securities transactions of our advisory representatives and employees be conducted in a manner consistent with the Code and avoid any actual or potential conflict of interest, or any abuse of an advisory representative’s or employee’s position of trust and responsibility;
- that advisory representatives may not take inappropriate advantage of their positions;
- that information concerning the identity of your security holdings and financial circumstances are confidential; and
- that independence in the investment decision-making process is paramount.

We will provide a copy of the Code to you or any prospective client upon request.

We buy and sell securities for our proprietary accounts that we also recommend to clients. Our advisory representatives and employees are also permitted to buy or sell the same securities for their personal and family accounts that are bought or sold for your account(s). The personal securities transactions by advisory representatives and employees may raise potential conflicts of interest when they trade in a security that is owned by you or considered for purchase or sale for you.

We have adopted policies and procedures that are intended to address these conflicts of interest. These policies and procedures:

- require our advisory representatives and employees to act in your best interest,
- prohibit favoring one client over another, and
- provide for the review of transactions to discover and correct any same-day trades that result in an advisory representative or employee receiving a better price than a client.

Advisory representatives and employees must follow our procedures when purchasing or selling the same securities purchased or sold for you.

### ***Brokerage Practices***

The custodians we recommend typically also serve as your broker-dealer. We may recommend Charles Schwab & Company, Inc. (“Schwab”), Fidelity Investments through its Institutional



Wealth Service Group (“Fidelity”), or TD Ameritrade, Inc. (“TD Ameritrade”) (together, the “Broker-Dealers”) to serve as the custodian and broker-dealer for your account. The Broker-Dealer you select will assist us in servicing your accounts. We are independently owned and operated and not affiliated with any Broker-Dealer. Our use of the Broker-Dealers is, however, a beneficial business arrangement for us and for them. Information regarding the benefits of this relationship is described below.

In recommending the Broker-Dealers as custodian and as the securities brokerage firm responsible for executing transactions for your portfolios, we consider at a minimum their:

- existing relationship with us,
- financial strength,
- reputation,
- reporting capabilities,
- execution capabilities,
- pricing, and
- types and quality of research.

The determining factor in the recommendation of the Broker-Dealers to execute transactions for your accounts is not the lowest possible transaction cost, but whether the Broker-Dealers can provide what is in our view the best qualitative execution for your account.

The Broker-Dealers provides us with access to its institutional trading and custody services, which includes:

- brokerage,
- custody,

- research, and
- access to mutual funds and other investments that are otherwise generally available only to institutional investors or would require a significantly higher minimum initial investment.

We are not required to place a minimum volume of transactions or maintain a minimum dollar amount of client assets to receive these services. The Broker-Dealers do not charge separately for holding our clients accounts, but may be compensated by you through other transaction-related fees associated with the securities transactions it executes for your accounts.

The Broker-Dealers may make available to us other products and services that benefit us but may not benefit you directly. Some of these products and services assist us in managing and administering our client accounts, such as software and other technology that:

- provide access to account data such as:
  - duplicate trade confirmations,
  - bundled duplicate account statements, and
  - access to an electronic communication network for client order entry and account information;
- facilitate trade execution, including:
  - access to a trading desk serving advisory participants exclusively and
  - access to block trading which provides the ability to combine

- securities transactions and then allocate the appropriate number of shares to each individual account;
- provide research, pricing information and other market data;
  - facilitate payment of our fees from client accounts; and
  - assist with back-office functions, record keeping and client reporting; and
  - receipt of compliance publications.

The Broker-Dealers also make available to us other services intended to help us manage and further develop our business. These services may include:

- consulting,
- publications and conferences on practice management,
- information technology,
- business succession,
- regulatory compliance, and
- marketing.

The Broker-Dealers may make available or arrange for these types of services to be provided to us by independent third parties. The Broker-Dealers may discount or waive the fees they would otherwise charge for some of the services made available to us. They may also pay all or a part of the fees of a third party providing these services to us.

We receive economic benefits as a result of our relationship with the Broker-Dealers because we do not have to produce or purchase the products and services listed above. We may have an

incentive to recommend a broker-dealer based on our interest in receiving the research or other products and services, rather than on your interest in receiving best execution. However, we believe that we act in your best interest to recommend broker-dealers that provide the combination of services and execution which best meet your needs.

Commissions and other fees for transactions executed through the Broker-Dealers may be higher than commissions and other fees available if you use another custodial or brokerage firm to execute transactions and maintain custody of your account. We believe, however, that the overall level of services and support provided to our clients by the broker-dealers we recommend outweighs the benefit of possibly lower transactions costs which may be available under other brokerage arrangements.

Many of the services described above may be used to benefit all or a substantial number of our accounts, including accounts not maintained through the broker-dealer who provided the service. We do not attempt to allocate these benefits to specific clients.

You may direct us in writing to use a particular broker-dealer to execute some or all of the transactions for your account. If you do so and it is not one of the above-mentioned Broker-Dealers, you are responsible for negotiating the terms and arrangements for the account with that broker-dealer. We may not be able to negotiate commissions, obtain

volume discounts, or best execution. In addition, under these circumstances a difference in commission charges may exist between the commissions charged to clients who direct us to use a particular broker or dealer and other clients who do not direct us to use a particular broker or dealer.

We may engage in bunched trading, which is the purchase or sale of a security for the accounts of multiple clients in a single transaction. If a bunched trade is executed, each participating client receives a price that represents the average of the prices at which all of the transactions in a given bunch were executed. If the order is not completely filled, the securities purchased or sold are distributed among participating clients on a pro rata basis or in some other equitable manner.

Bunched trades are placed only when we reasonably believe that the combination of the transactions provides better prices for clients than had individual transactions been placed for clients. Transactions for nondiscretionary client accounts are not bunched with transactions for discretionary client accounts. Transactions for the accounts of our employees may be included in bunched trades. They receive the same average price and pay the same commissions and other transaction costs, as clients. Transactions for the accounts of our employees will not be favored over transactions for client accounts.

We are not obligated to include any client account in a bunched trade. Bunched trades will not be placed for any client's account if doing so is prohibited or otherwise inconsistent with that client's investment advisory agreement. No client will be favored over any other client.

## ***Review of Accounts***

The portfolio of recommended securities is generally reviewed, in aggregate on an ongoing basis. Any perceived need for change based on any of these reviews is then considered for each client portfolio on an individual basis.

Each individual portfolio is reviewed no less frequently than quarterly, although the sequences and frequency of reviews may change depending upon your particular needs or objectives, or the nature of the portfolio.

Changes in your circumstances or general market conditions, as well as other economic or political changes may trigger more frequent reviews. One or more of three Managing Partners will conduct these reviews.

We also periodically review reports provided to you by the unaffiliated investment adviser that may manage your account. We contact you at least annually, or more often as we agree upon, to:

- review your financial situation and objectives,

- communicate information to the unaffiliated adviser managing the account as warranted, and
- to assist you in understanding and evaluating the services provided.

### ***Client Referrals and Other Compensation***

We have entered into a written compensation agreement with an unaffiliated investment adviser. They pay us a percentage of the fee that you pay to them as a result of our referral. These payments are a portion of the fee that the other adviser typically charges and do not result in an increase in the amount of the fee that you pay. Any solicitation or referral arrangements comply with applicable laws that govern:

- the nature of the service,
- fees to be paid,
- disclosures to clients, and
- any necessary client consents.

Arrangements of this nature are considered to present a conflict of interest because it creates an incentive to make recommendations based upon the amount of compensation an adviser receives rather than based upon a client's needs. We explain the specific costs associated with any recommended investments or unaffiliated advisers, and believe we make these recommendations in your best interest.

We also receive certain economic benefits as a result of our participation in Schwab's institutional program. Those

benefits are described in detail in the preceding section entitled "Brokerage Practices."

We may directly compensate persons or firms for client referrals, provided that those persons are qualified and have entered a written agreement with us. If you have been referred to us, you will be provided full disclosure of the compensation paid to the solicitor. These payments will be a portion of the fee charged by us and will not result in an increase in the amount of the fee paid by you. Any referral arrangement will comply with applicable laws and regulations that govern the nature of the service provided.

### ***Custody***

We do not serve as the qualified custodian for your account. You will receive statements from the custodian that holds your investment account on at least a quarterly basis. We urge you to carefully review these statements and compare them to the account statements that we may provide you. You should verify that the transactions in your account are consistent with your investment goals and the objectives for your account. We also encourage you to contact your advisory representative or our Chief Compliance Officer should you have any questions or concerns regarding your account.

## ***Investment Discretion***

We offer our advisory services on a discretionary and non-discretionary basis. Discretionary means that we do not need advance approval from you to determine the type and amount of securities to be bought and sold for your accounts.

Non-discretionary means that we must obtain advance approval of our recommendations from you prior to the purchase or sale of any securities for your accounts.

We do not, in either case, have the ability to choose the broker-dealer through which transactions will be executed without your prior approval. You may direct that such transactions be placed through brokers specified by you. Additionally, we do not have the ability to withdraw funds from your account (other than to withdraw our advisory fees which, may only be done with your prior written authorization.)

Discretion is used in a manner consistent with the stated investment objectives for your account, if you have given us written authorization to do so. We only exercise discretion in accounts where we have been authorized by you. This authorization is typically included in the investment management agreement you enter into with us.

For accounts managed by an unaffiliated investment adviser, all securities transactions are typically decided upon and placed by that manager. We do not manage, or obtain discretionary authority

over the assets in accounts participating in these programs. However, you may grant us the discretionary authority to hire and fire unaffiliated investment managers and/or allocate your assets among managers.

## ***Voting Client Securities***

Generally, we do not take any action or give any advice with respect to voting of proxies solicited by or with respect to the issuers of securities in which your accounts may be invested. In addition, we do not take any action or give any advice with respect to any securities held in any accounts that are named in or subject to class action lawsuits.

Subject to the direction of certain ERISA clients, proxies on securities held in those accounts are voted by our internal managers. We have adopted policies and procedures designed to comply with our fiduciary obligations and to prevent conflicts of interest from influencing proxy voting decisions made on behalf of ERISA clients. Our proxy voting policies and procedures, including information for ERISA clients on how their securities were voted, are available upon written request to:

Arcus Capital Partners, LLC  
Attention: Chief Compliance Officer  
3060 Peachtree Road NW  
Atlanta, GA 30305.

### ***Financial Information***

We have no financial commitment that impairs our ability to meet contractual and fiduciary commitments to you and

we have not been the subject of a bankruptcy proceeding.

Stephen S. Sloan

***Arcus Capital Partners, LLC***

***3060 Peachtree Road NW  
Suite 1880  
Atlanta, GA 30305***

***404.949.2115***

***www.arcuscp.com***

***Brochure Supplement***

February 25, 2013

**This brochure supplement provides information about Stephen Sloan that supplements the Arcus Capital Partner brochure. You should have received a copy of that brochure. Please contact Jessica Arnold, Vice President, if you did not receive Arcus Capital Partner's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Stephen Sloan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). His CRD number is 426453.**

## **Educational Background and Business Experience**



Stephen Sloan

*Year of birth:* 1948

*Formal education:*

- University of Georgia, BA 1971

*Business background:*

- Arcus Capital Partners, LLC – Chairman and Managing Partner/Chief Compliance Officer (09/08 – Present)
- Credit Suisse Private Banking - Managing Director/Regional Sales Manager (2004 – 2008)
- J.P. Morgan Private Bank – Founder and Manager of Atlanta Office (2000 – 2004)
- J.P. Morgan Securities-Managing Director and Manager of Energy Group (1989-2000)
- E.F. Hutton Investment Banking-Senior Vice President (1975-1987)

## **Disciplinary Information**

Stephen Sloan has not been the subject of any legal or disciplinary event.

## **Other Business Activities**

Mr. Sloan is not engaged in any business activities other than those related to Arcus Capital Partners, LLC.

## **Additional Compensation**

Stephen Sloan does not receive any additional compensation related to the advisory services provided to you.

## **Supervision**

Stephen Sloan is supervised by Ross Singletary, Managing Partner. Mr. Singletary can be reached at 404.949.2114.

We supervise Mr. Sloan by requiring that he adhere to our processes and procedures as described in our firm's Code of Ethics. We will monitor the advice that Mr. Sloan gives to you by performing the following reviews:

- A review of relevant account opening documentation when the relationship is established;
- A review of account transactions;
- Review custodial information on a quarterly basis to assess account activity;
- Perform annual oversight so that Mr. Sloan is aware of your current



- financial situation, objectives, and individual investment needs; and
- A review of client correspondence on an as needed basis.

W. Ross Singletary, II

***Arcus Capital Partners, LLC***

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Suite 1620  
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***Brochure Supplement***

December 1, 2013

**This brochure supplement provides information about Ross Singletary that supplements the Arcus Capital Partner brochure. You should have received a copy of that brochure. Please contact Jessica Arnold, Vice President, if you did not receive Arcus Capital Partner's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Ross Singletary is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). His CRD number is 2431084.**

## ***Educational Background and Business Experience***



Ross Singletary

*Year of birth:* 1967

*Formal education:*

- Washington & Lee University, BA 1989
- Columbia University, MBA 1998

*Business background:*

- Arcus Capital Partners, LLC – Managing Partner (09/08 – Present)
- Credit Suisse Private Banking – Director (2001 – 2008)
- Morgan Stanley Private Wealth Management - Associate (1998 – 2001)
- Conseco/Western National – Vice President and Financial Institutions National Sales Manager (1993-1998)
- First Union Bank – Corporate Banking (1989-1993)

## ***Disciplinary Information***

Ross Singletary has not been the subject of any legal or disciplinary event.

## ***Other Business Activities***

Mr. Singletary is not engaged in any business activities other than those related to Arcus Capital Partners, LLC.

## ***Additional Compensation***

Ross Singletary does not receive any additional compensation related to the advisory services provided to you.

## ***Supervision***

Ross Singletary is supervised by Stephen Sloan, Chief Compliance Officer. Mr. Sloan can be reached at 404.949.2115.

We supervise Mr. Singletary by requiring that he adhere to our processes and procedures as described in our firm's Code of Ethics. We will monitor the advice that Mr. Singletary gives to you by performing the following reviews:

- A review of relevant account opening documentation when the relationship is established;
- A review of account transactions;

- Review custodial information on a quarterly basis to assess account activity;
- Perform annual oversight so that Mr. Singletary is aware of your current financial situation, objectives, and individual investment needs; and
- A review of client correspondence on an as needed basis.

Steven C. Edwards

***Arcus Capital Partners, LLC***

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Suite 1880  
Atlanta, GA 30305***

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***Brochure Supplement***

April 3, 2012

**This brochure supplement provides information about Steven Edwards that supplements the Arcus Capital Partner brochure. You should have received a copy of that brochure. Please contact Jessica Arnold, Vice President, if you did not receive Arcus Capital Partner's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Steven Edwards is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). His CRD number is 2469795.**

## **Educational Background and Business Experience**



Steven Edwards

*Year of birth:* 1970

*Formal education:*

- University of Georgia, BBA 1992

*Business background:*

- Arcus Capital Partners, LLC – Managing Partner (09/08 – Present)
- Credit Suisse Private Banking - Director (2001 – 2008)
- Morgan Stanley Private Wealth Management - Associate (1998 – 2001)

## **Disciplinary Information**

Steven Edwards has not been the subject of any legal or disciplinary event.

## **Other Business Activities**

Mr. Edwards is not engaged in any business activities other than those related to Arcus Capital Partners, LLC.

## **Additional Compensation**

Steven Edwards does not receive any additional compensation related to the advisory services provided to you.

## **Supervision**

Steven Edwards is supervised by Stephen Sloan, Chief Compliance Officer. Mr. Sloan can be reached at 404.949.2115.

We supervise Mr. Edwards by requiring that he adhere to our processes and procedures as described in our firm's Code of Ethics. We will monitor the advice that Mr. Edwards gives to you by performing the following reviews:

- A review of relevant account opening documentation when the relationship is established;
- A review of account transactions;
- Review custodial information on a quarterly basis to assess account activity;
- Perform annual oversight so that Mr. Edwards is aware of your current financial situation, objectives, and individual investment needs; and
- A review of client correspondence on an as needed basis

William K. Tugurian

***Arcus Capital Partners, LLC***

***11726 San Vincente Boulevard  
Suite 300  
Los Angeles, CA 90049***

***310.820.8302***

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***Brochure Supplement***

December 1, 2013

**This brochure supplement provides information about Bill Tugurian that supplements the Arcus Capital Partner brochure. You should have received a copy of that brochure. Please contact Jessica Arnold, Vice President, if you did not receive Arcus Capital Partner's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Bill Tugurian is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). His CRD number is 2631095.**

## **Educational Background and Business Experience**

William K. Tugurian

*Year of birth:* 1964

### *Formal education:*

- University of Alabama, BA 1989
- Vanderbilt University, MBA 1996

### *Business background:*

- Arcus Capital Partners, LLC – Managing Director (03/13 – Present)
- Morgan Stanley Smith Barney - Executive Director, Strategic Lead Management (2010 – 2012)
- Morgan Stanley Private Wealth Management – Head of U.S. Professional Development and member of the U.S. PWM Operating Committee (2008 – 2010)
- Morgan Stanley Private Wealth Management – Vice-President & Private Wealth Advisor (1996 - 2008)
- Vanderbilt University – Director of Development & Major Gifts Officer (1989 - 1994)

## **Disciplinary Information**

William Tugurian has not been the subject of any legal or disciplinary event.

## **Other Business Activities**

William Tugurian is not engaged in any business activities other than those related to Arcus Capital Partners, LLC.

## **Additional Compensation**

William Tugurian does not receive any additional compensation related to the advisory services provided to you.

## **Supervision**

William Tugurian is supervised by Stephen Sloan, Managing Partner. Mr. Sloan can be reached at 404.949.2115.

We supervise Mr. Tugurian by requiring that he adhere to our processes and procedures as described in our firm's Code of Ethics. We will monitor the advice that Mr. Sloan gives to you by performing the following reviews:

- A review of relevant account opening documentation when the relationship is established;
- A review of account transactions;
- Review custodial information on a quarterly basis to assess account activity;
- Perform annual oversight so that Mr. Tugurian is aware of your current financial situation, objectives, and individual investment needs;
- A review of client correspondence on an as needed basis.



Robert W. Joel

***Arcus Capital Partners, LLC***

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Jacksonville, FL 32202***

***904.382.3715***

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***Brochure Supplement***

April 3, 2012

**This brochure supplement provides information about Robert W. Joel that supplements the Arcus Capital Partner brochure. You should have received a copy of that brochure. Please contact Jessica Arnold, Vice President, if you did not receive Arcus Capital Partner's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Robert W. Joel is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). His CRD number is 2049509.**

## ***Educational Background and Business Experience***



Robert W. Joel

*Year of birth:* 1967

### ***Formal education:***

- Florida State University, BA 1990

### ***Business background:***

- Arcus Capital Partners, LLC – Principal (01/12 – Present)
- HighTower Advisors, LLC – Partner & Director (01/11 – 01/12)
- Timucuan Asset Management, Inc. – Vice President (1996 – 2011)
- AmSouth Bank – Assistant Vice President & Trust Officer (1994 - 1996)
- First Union Capital Management - Assistant Vice President & Trust Officer (1993 - 1994)

### ***Professional Designations:***

***Certified Financial Planner™*** - 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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client

scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – 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 planning field; and
- Ethics – 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### ***Disciplinary Information***

Robert W. Joel has not been the subject of any legal or disciplinary event.

### ***Other Business Activities***

Mr. Joel is not engaged in any business activities other than those related to Arcus Capital Partners, LLC.

### ***Additional Compensation***

Robert W. Joel does not receive any additional compensation related to the advisory services provided to you.

### ***Supervision***

Robert W. Joel is supervised by Stephen Sloan, Chief Compliance Officer. Mr. Sloan can be reached at 404.949.2115.

We supervise Mr. Joel by requiring that he adhere to our processes and procedures as described in our firm's Code of Ethics. We will monitor the advice that Mr. Sloan gives to you by performing the following reviews:

- A review of relevant account opening documentation when the relationship is established;
- A review of account transactions;
- Review custodial information on a quarterly basis to assess account activity;
- Perform annual oversight so that Mr. Sloan is aware of your current financial situation, objectives, and individual investment needs; and
- A review of client correspondence on an as needed basis.

Daniel A. Mack

***Arcus Capital Partners, LLC***

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Suite 1880  
Atlanta, GA 30305***

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***Brochure Supplement***

December 1, 2013

**This brochure supplement provides information about Danny Mack that supplements the Arcus Capital Partner brochure. You should have received a copy of that brochure. Please contact Jessica Arnold, Vice President, if you did not receive Arcus Capital Partner's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Danny Mack is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). His CRD number is 5524498.**

## **Educational Background and Business Experience**



Danny Mack

*Year of Birth:* 1985

### *Formal Education:*

- University of Georgia, BBA 2007

### *Business Background:*

- Arcus Capital Partners, Vice President (9/2013 – present)
- Stadion Money Management, Senior Analyst, Portfolio Manager, (2008 – 2013)
- Fisher Investments, Trading and Investment, Operations Associate (2007 – 2008)

## **Disciplinary Information**

Danny Mack has not been the subject of any legal or disciplinary event.

## **Other Business Activities**

Mr. Mack is not engaged in any business activities other than those related to Arcus Capital Partners.

## **Additional Compensation**

Danny Mack does not receive any additional compensation related to the advisory services provided to you.

## **Supervision**

Danny Mack is supervised by Stephen Sloan, Chief Compliance Officer. Mr. Sloan can be reached at 404-949-2115.

We supervise Mr. Mack by requiring that he adhere to our processes and procedures as described in our firm's Code of Ethics. We will monitor the advice that Mr. Mack gives you by performing the following reviews:

- A review of relevant account opening documentation when the relationship is established;
- A review of account transactions;
- Review custodial information on a quarterly basis to assess account activity;
- Perform annual oversight so that Mr. Sloan is aware of your current financial situation, objectives, and individual investment needs; and
- A review of client correspondence on an as needed basis.