

**INTEGRIS, LLC**  
**BROCHURE SUPPLEMENT AMENDMENTS**

**FORM ADV PART 2B**  
**DECEMBER 2012**

**ITEM 1: COVER PAGE**

**FIRM NAME:** Integris, LLC  
**ADDRESS:** 1020 Prospect Street  
Suite 311  
La Jolla, CA 92037  
  
**CONTACT:** William J. Kullback  
858.997.2773  
**bkullback@integrisllc.net**  
  
**WEBSITE:** [www.integrisllc.net](http://www.integrisllc.net)

**This brochure supplement provides information about Richard J. Effress that supplements the Integris, LLC brochure. You should have received a copy of that brochure. Please contact William J. Kullback if you did not receive the Integris, LLC brochure or if you have any questions about the contents of this supplement.**

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

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

### **Richard J. Effress**

Born 1970

Undergraduate degree: Wharton School of the University of Pennsylvania (1992). Bachelor of Science in Economics, *summa cum laude*, with a concentration in Finance.

Graduate degree: Harvard University Graduate School of Business Administration (1997). Masters in Business Administration. Awarded Baker Scholar (top 5% of class).

#### **PROFESSIONAL EXPERIENCE (last 5 years):**

10/05-Present: Founder, Integris, LLC (La Jolla, CA). Integris is an independent wealth advisory firm that serves as a multi-family office for a select group of high net worth families. The firm was founded to manage and allocate the family wealth of Integris principals; subsequently, the investment platform was opened to outside families. Prior to 2011, Integris was also involved in business activities other than investment advisory activities. Such other activities are limited in scope and commitment.

## **Item 3: Disciplinary Information**

We have nothing to disclose in this regard.

## **Item 4: Other Business Activities**

Mr. Effress intends to limit his involvement with other business activities such that the time devoted to activities other than providing investment advice will not detract from his ability to provide effective advisory services on behalf of his clients.

## **Item 5: Additional Compensation**

Richard J. Effress does not receive any economic benefit for providing advisory services from sources other than clients. He does not receive or accept any indirect forms of compensation or commissions through the purchase or sale of securities or other investment products.

## **Item 6: Supervision**

Integris, LLC monitors the advice provided by the supervised person through client meetings, documentations, and correspondence. If you have any questions about this brochure supplement, please contact William J. Kullback at 858.997-.2773 or email [bkullback@integrisllc.net](mailto:bkullback@integrisllc.net).

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**This brochure supplement provides information about Theodore Tu that supplements the Integris, LLC brochure. You should have received a copy of that brochure. Please contact William J. Kullback if you did not receive the Integris, LLC brochure or if you have any questions about the contents of this supplement.**

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

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

### **Theodore Tu**

Born 1968

Undergraduate degree: University of California, Berkeley (1990). Bachelor of Art in Economics. Bachelor of Art in Asian Studies.

#### **PROFESSIONAL EXPERIENCE (last 5 years):**

09/10-Present: Investment Advisor, Integris, LLC (La Jolla, CA). Investment professional with responsibilities across the full spectrum of portfolio management and advisory activities.

01/09-08/10: Principal, Everton Associates (San Diego, CA). Investment professional focused on trading and allocation strategies across major asset classes.

04/02-12/08: Partner, Context Capital Management (San Diego, CA). Responsible for portfolio risk management, operations, and internal business activities at this multi-strategy hedge fund.

## **Item 3: Disciplinary Information**

We have nothing to disclose in this regard.

## **Item 4: Other Business Activities**

We have nothing to disclose in this regard.

## **Item 5: Additional Compensation**

Theodore Tu does not receive any economic benefit for providing advisory services from sources other than clients. He does not receive or accept any indirect forms of compensation or commissions through the purchase or sale of securities or other investment products.

## **Item 6: Supervision**

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

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

### **Mehmet I. Budak**

Born 1973

Undergraduate degree: United States Military Academy (1995). Bachelor of Science in Mathematical Economics with Distinction.

Graduate degree: Gazi University Institute of Science and Technology (1998). Master of Science in Industrial Engineering.

Graduate degree: The Wharton School, University of Pennsylvania (2000). Master of Business Administration in dual majors; Finance and Management.

#### **PROFESSIONAL EXPERIENCE (last 5 years):**

10/12-Present: Investment Advisor, Integris, LLC (La Jolla, CA). Investment professional with responsibilities across the full spectrum of portfolio management and advisory activities.

05/10-07/11: Deputy Chief Executive Officer, TFO Investments (Bahrain and New York, NY). Investment professional focused on capital raising and strategic initiatives.

10/07-1/10: Senior Investment Director & Head of EMEA Region Office, Marathon Asset Management (New York, NY and Istanbul). Responsible for EMEA investments and business development.

## **Item 3: Disciplinary Information**

We have nothing to disclose in this regard.

## **Item 4: Other Business Activities**

We have nothing to disclose in this regard.

## **Item 5: Additional Compensation**

Mehmet I. Budak does not receive any economic benefit for providing advisory services from sources other than clients. He does not receive or accept any indirect forms of compensation or commissions through the purchase or sale of securities or other investment products.

## **Item 6: Supervision**

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