



**Innovation Partners, LLC**  
Committed to Increasing Profits

## **INNOVATION PARTNERS LLC**

Plantation Center Office Complex

2423-A Plantation Center Drive

Matthews, NC 28105

(704) 708-5461

[www.innovationpartnersllc.com](http://www.innovationpartnersllc.com)

February 25, 2014

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**

**Steven Michael White**

CRD#: 1022056

## Innovation Partners LLC: Form ADV, Part 2B Steven Michael White

### Item 2- Educational Background and Business Experience

**Steven Michael White**

Date of Birth: July 18, 1954

#### Education

Bachelors of Science in Business –Marketing, Eastern Michigan University, 1972-1978

#### Designations

CLTC Board of Standards, Inc. – Certified in Long-Term Care (CLTC)

Steven White is an Investment Advisor Representative and a Registered Representative in the state of Michigan. He passed the FINRA Series 6, 7, 22, 63 and 66, exams and is a licensed insurance agent in the states of FL, IL, IN, MI, MO, NY, OH, OK, & VA.

#### Business Background:

**Innovation Partners LLC:** 02/2014 – Present – Investment Advisor Representative and Registered Representative

**Steven M. White and Associates:** 05/2001 – Present – Life, Health, LTC Insurance Agent and CLTC

**MML Investor Services:** 09/1982 – 02/2014 – Farmington Hills Michigan – Registered Representative, Investment Advisor Representative and Insurance Agent

### 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

Steven White is an investment advisor representative and an insurance agent with Innovation Partners LLC. Mr. White holds an insurance license in the states FL, IL, IN, MI, MO, NY, OH, OK, & VA.

### 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.