



**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)

September 9, 2013

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**

**Walter L. Tillman Jr.**

CRD#: 6251343

Innovation Partners LLC: Form ADV, Part 2B Walter L. Tillman Jr.

**Item 2- Educational Background and Business Experience**

**Walter L. Tillman Jr.**

Date of Birth: January 20, 1951

**Education**

Wake Forrest University, MBA 1975

Virginia Military Institute, BA Economics 1973

Awarded John C. Philpot medal of excellence in Economic Research

Varsity Soccer, ROTC

Walter L. Tillman Jr. is an Investment Advisor Representative and a Registered Representative in the state of PA. He passed the FINRA Series 65, exam and is a licensed life, accident and health, and fixed annuity insurance agent in the state of PA.

Mr. Tillman was a commissioned 2<sup>nd</sup> Lieutenant, U.S. Army Reserve, ARMOR 1973

**Business Background:**

**Innovation Partners LLC:** 03/2014 – Present – Investment Advisor Representative

**Underwriting Specialists Inc.:** 2013 – Present - President

**BankProforma LLC, Lower Gwynedd, PA:** 2012 – Present– Chief Executive Officer

**Vantage Point Bank:** 2006- 2012 – Chairman and Chief Executive Officer

**Earthstar Bank:** 2000 – 2005- President and Chief Executive Officer

**Banking Consultant, Lower Gwynedd, PA.:** 1998 -1999 – Principal

**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**

Walter L. Tillman Jr. is an investment advisor representative and insurance agent with Innovation Partners LLC. Mr. Tillman is a licensed life, accident and health, and fixed annuity insurance agent in the state of PA.

**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.