

# **Greenline Partners, LLC FORM ADV PART 2B**

## **(Brochure Supplement)**

1 Grand Central Place, Suite 2050  
New York, NY 10165  
(646) 470-8714

2700 East Madison Street  
Seattle, WA. 98112  
(206) 890-9890

September 29, 2014

This brochure supplement provides information about the following partners and investment adviser representatives who manage Client portfolios, or provide investment advice to Clients.

1. Peter Joers CRD Number 2169200
2. Maneesh Shanbhag CRD Number 6082879
3. John A. Snyder CRD Number 835281
4. Marianne Love CRD Number 4919914

Additional information about our investment adviser representatives is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

You should have received a copy of the Part 2A brochure as we include these supplements with all copies. Please contact Peter Joers, if you did not receive Greenline's Brochure, or if you have any questions related to the brochure or this supplement.

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

### **Peter Joers**

#### **Founding Member and Partner of Greenline Partners, LLC**

Year of Birth: 1966

#### Education:

MBA, Southern Methodist University (1991)

BA in Political Science, University of Washington (1988)

#### Business Background:

Bridgewater Associates, Senior Client Advisor (2010-2011)

Bank of America, President, Washington (2006-2010)

Montgomery Securities/Bank of America/US Trust, Managing Director (2002-2010)

Prior to founding Greenline Partners, Mr. Joers was a Client Advisor at Bridgewater Associates where he advised some of the largest pension plans and endowments.

### **Maneesh Shanbhag**

#### **Founding Member and Partner of Greenline Partners, LLC**

Year of Birth: 1978

#### Education:

MBA, University of Illinois at Urbana-Champaign (2005)

MS in Electrical Engineering, University of Illinois at Urbana-Champaign (2002)

BASc in Electrical Engineering, University of Waterloo (Waterloo, Canada) (2001)

#### Business Background:

Bridgewater Associates, Associate Client Advisor (2010-2011)

Bridgewater Associates, Account Management Associate (2006-2009)

Main Street Wealth Management, Portfolio Manager (2005-2006)

Prior to founding Greenline Partners, Mr. Shanbhag was an associate client advisor from 2010-2011 at Bridgewater Associates, LLP, of Westport, CT, and an associate from 2006-2009. At Bridgewater, Maneesh worked with Global Investor Top 100 global institutional investors to improve their asset allocation. Maneesh is also a CFA charterholder of the CFA Institute. The CFA designation is issued by the CFA Institute. A CFA candidate must meet one of the following education or experience requirements: Undergraduate degree and four years of professional

experience involving investment decision-making, or four years qualified work experience (full time, but not necessarily investment related). CFA candidates must satisfy educational requirements of 250 hours of study and a course examination for each of the 3 levels. There are no continuing education or ongoing experience requirements to maintain the designation.

**John Anthony Snyder**  
**Partner of Greenline Partners, LLC**

Year of Birth: 1947

Education:

MS in Accountancy, University of Houston (1972)  
Bachelor of Business Administration, University of Texas (1969)  
Certified Public Accountant

Business Background:

Coastal Range Investment Management, Owner, LLC (2010- 2013)  
Retired (Mar 2010-Sept 2010)  
Banc of America Investment Securities, Inc./Merrill Lynch, Pierce, Fenner & Smith,  
Investment Advisor Representative (2000-2010)

**Marianne Love**  
**Partner of Greenline Partners, LLC**

Year of Birth: 1981

Education:

MBA, Harvard Business School (2008)  
AB in Economics (magna cum laude), Princeton University (2003)

Business Background:

Bridgewater Associates, Client Advisor, (2010-2013)  
Goldman Sachs, Associate, Pension, Endowment & Foundation Group (2008-2010)  
Goldman Sachs, Analyst, Corporate Treasury (2005-2006)  
Goldman Sachs, Analyst, Pension, Endowment & Foundation Group (2003-2005)

**Item 3 – Disciplinary Information**

There is no relevant disciplinary information for Mr. Joers, Mr. Shanbhag, Mr. Snyder or Ms. Love that must be disclosed in this document. More information on the Investment Adviser

representatives you are evaluating is available at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

#### **Item 4 – Other Business Activities**

There are no other reportable business activities for Mr. Shanbhag, Mr. Joers, Mr. Snyder or Ms. Love.

#### **Item 5 – Additional Compensation**

No additional compensation is received by Mr. Shanbhag, Mr. Joers, Mr. Snyder or Ms. Love.

#### **Item 6 – Supervision**

Mr. Snyder and Ms. Love are under the direct supervision of Mr. Joers and Mr. Shanbhag and is subject to Greenline's Code of Ethics and other compliance policies and procedures. Mr. Joers advises Mr. Snyder and Ms. Love on client communication and monitors advice given to clients by reviewing all sales materials prior to use, periodically attending calls and meetings with Mr. Snyder and Ms. Love, and reviewing financial plans created for his clients based on input from the Client Information Form.

Mr. Joers and Mr. Shanbhag are Members of Greenline. They are subject to Greenline's Code of Ethics and other compliance policies and procedures. They can be reached at (646) 470-8714.