
Charles D. Donaldson

Legacy Chief Investment Office LLC

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281-419-6436

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This Brochure Supplement provides information about Charles D. Donaldson (“Charles D. Donaldson”, or “he”) that supplements the Brochure of Legacy Chief Investment Office LLC (“Legacy CIO”, “firm”, “our” and or “we”). When we use the words “you”, “your” and “client” we are referring to you as our client or our prospective client. You should have received a copy of the Brochure. Please contact Charles D. Donaldson, CIO and Chief Compliance Officer, if you did not receive Legacy CIO’s Brochure or if you have any questions about the contents of this supplement.

Additional information about Charles D. Donaldson is available on the Securities and Exchange Commission’s (“SEC”) website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Charles “Charley” D. Donaldson was born in 1979.

His Educational Background

Charley Donaldson, CFA has an undergraduate degree from the Hankamer School of Business at Baylor University (2002) and a MBA from the Jones Graduate School of Business at Rice University (2009). Charley holds the Chartered Financial Analyst (CFA) designation.

His Business Experience for the prior 5 years includes:

05/2014 - Present	Legacy Chief Investment Office LLC, Chief Investment Officer, Managing Member, Chief Compliance Officer
06/2009 to 05/2014	J.P. Morgan Private Bank, Investment Specialist

Professional Designations:

Chartered Financial Analyst

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to: (i) place their clients' interests ahead of their own, (ii) maintain independence and objectivity, (iii) act with integrity, (iv) maintain and improve their professional competence, and (v) disclose conflicts of interest and legal matters.

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

Disciplinary Information

There is no material information or facts regarding any legal or disciplinary events that would be material to your evaluation of Charles Donaldson's integrity or the investment advisory services provided by Charles Donaldson through us.

Other Business Activities

Charles Donaldson does not have any investment related business.

Additional Compensation

Charles Donaldson does not receive additional compensation from any third party for providing investment advisory services.

Supervision

Charles D. Donaldson is the Managing Member, Chief Investment Officer and Chief Compliance Officer of the firm. Charles Donaldson can be contacted by phone at 281-419-6436. Additionally, Legacy CIO maintains and follows its policies and procedures and code of ethics to guide the supervision of advisory activities.