

Brochure Supplement
(Provided Under Part 2B of Form ADV)
March 2015

S. Katherine Campbell, CFP®

NORTH BERKELEY INVESTMENT PARTNERS, LLC

900 Colusa Avenue #201

Berkeley, CA 94707

Phone: (510) 528-5820

Fax: (510) 528-0711

www.northberkeleyinvestment.com

This brochure supplement provides information about S. Katherine ("Kate") Campbell that supplements our brochure. You should have received a copy of that brochure. Please contact S. Katherine Campbell, Chief Compliance Officer, if you did not receive North Berkeley Investment Partners, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kate is available on the SEC's website at www.adviserinfo.sec.gov.

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

S. Katherine Campbell

Date of Birth: December 24, 1961

Educational Background:

- University of California, Berkeley; MA; 1990
- Dartmouth College; AB; 1983

Business Background:

- North Berkeley Investment Partners, LLC – Member, Chief Compliance Officer & Investment Advisor Representative, July 2005 to Present
- Protected Investors of America – CFO, 1994-1999; President, 1999-2001; Registered Representative & Minority Shareholder, May 1993 to September 2012

Licenses and Professional Designations:

- CA Insurance License #0C09134
- CFP® - CERTIFIED FINANCIAL PLANNER™



S. Katherine Campbell, CFP®

Kate is a Partner of the firm and leads many client relationships at North Berkeley Investment Partners. Kate leads the firm's financial planning function. Kate has sixteen years of experience providing financial planning, investment advice, and investment management for individuals and families. Before founding the firm with Sue Reinhold in 2005, Kate had built a financial planning and investment management practice that had about \$130 million of total assets in client portfolios. From 1993 to 2012, Kate served as CFO, and then President, of Protected Investors of America, an independent, Associate-owned securities brokerage firm, and has served on the board.



Kate has spent time serving on committees of the Financial Industry Regulatory Authority (FINRA), previously called the National Association of Securities Dealers (NASD), in the areas of development of policy and regulations, and has served on securities industry disciplinary panels. Kate is a member of the San Francisco chapter of the Financial Planning Association, and the Social Investment Forum, a national network of investment professionals who work in the area of socially responsible investing.

Kate received her A.B. in Chinese Language and Culture from Dartmouth College and an M.A. in Anthropology from the University of California at Berkeley. Kate grew up in Lafayette, and now lives in North Berkeley with her son and daughter. She enjoys hiking, cooking, duplicate bridge, learning piano and time with her family.

CFP® - CERTIFIED FINANCIAL PLANNER™:

The Certified Financial Planner™, CFP® and federally registered CFP marks are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United

States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

DISCIPLINARY INFORMATION

Kate has not been subject to any disciplinary actions through her affiliation with North Berkeley Investment Partners, LLC as regulated by the Securities and Exchange Commission (SEC).

OTHER BUSINESS ACTIVITIES

Kate also holds a California insurance license for the purpose of providing insurance services to existing clients. A conflict of interest may arise as these commissionable insurance product sales may create an incentive to recommend products based on the compensation Kate may earn and may not necessarily be in the best interests of the client. In order to minimize this conflict of interest, she will place client interests ahead of her own interests and adhere to our firm's Code of Ethics as well as clearly explaining this conflict when recommending any such products to clients. Clients are not obligated to purchase these products.

ADDITIONAL COMPENSATION

Kate does not receive economic benefits from a non-client for providing advisory services.

SUPERVISION

Sue Reinhold, principal of North Berkeley Investment Partners, LLC, supervises and monitors Kate's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Kate directly if you have any questions about her brochure supplement at (510) 528-5820.

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Sue Reinhold, Ph.D.

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This brochure supplement provides information about Sue Reinhold, Ph.D. that supplements our brochure. You should have received a copy of that brochure. Please contact S. Katherine ("Kate") Campbell, Chief Compliance Officer, if you did not receive North Berkeley Investment Partners, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Dr. Reinhold is available on the SEC's website at www.adviserinfo.sec.gov.

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Sue Reinhold, Ph.D.

Date of Birth: October 23, 1964

Educational Background:

- University of Sussex; Ph.D. Social Anthropology; 1994
- Stanford University; AB; 1988

Business Background:

- North Berkeley Investment Partners, LLC – Member; Investment Advisor Representative, August 2005 to Present
- Protected Investors of America – Registered Representative, September 2005-September 2012
- HealthNet, Inc. – Vice President, Strategy and Development, 2001-2005
- Scient – Director, 2000-2001
- RCM Capital Management – Healthcare Analyst, 1997-1999
- Jurika & Voyles – Equity Analyst, 1995-1997
- Relevant Research – Founder, 1993-1995



Sue Reinhold, Ph.D.

Sue is a Partner of the firm, leads many client relationships and has responsibility for the investment management process for all clients of the firm. Sue has twenty-one years of private, institutional, and corporate investment and management experience. Sue began her investment career in 1993 doing market and business research for private investors. From 1995 to 1999, Sue was an equity analyst at two investment management firms, first at Jurika & Voyles, an Oakland-based value manager, and then at RCM Capital Management, a San Francisco-based growth manager. At RCM, Sue also managed midcap healthcare stock portfolios and co-managed two healthcare mutual funds.

Before co-founding North Berkeley Investment Partners in 2005, Sue built and led the corporate strategy team at Health Net, a Fortune 200 healthcare company and one of the companies she researched as an equity analyst. At Health Net, Sue was responsible for long-term strategic and business planning, and served on the company's Senior Leadership Team.



Sue holds an A.B. from Stanford University, and a Ph.D. in Social Anthropology from the University of Sussex, England, where she studied as a Marshall Scholar. Five generations of Sue's family have lived in North Berkeley, and Sue and her wife Deborah share time between North Berkeley and San Francisco where they are raising a blended family with four teens. Sue is the founding Treasurer of The Kitchen SF, a start-up synagogue in San Francisco recently named to the Slingshot 50 as one of the most innovative Jewish nonprofits in the country. She recently finished a term as Treasurer of the East Bay Jewish Community Center. She also serves on the Investment Advisory Committee of Futures Without Violence, a San Francisco-based nonprofit working to prevent and end domestic violence. Sue speaks fluent Portuguese and enjoys swimming, hiking, time with her family, and studying and teaching Torah.

DISCIPLINARY INFORMATION

Dr. Sue Reinhold has not been subject to any disciplinary actions through her affiliation with North Berkeley Investment Partners, LLC as regulated by the Securities and Exchange Commission (SEC).

OTHER BUSINESS ACTIVITIES

Sue does not have any other business activities to disclose.

ADDITIONAL COMPENSATION

Sue does not receive economic benefits from a non-client for providing advisory services.

SUPERVISION

S. Katherine ("Kate") Campbell, Chief Compliance Officer of North Berkeley, supervises and monitors Sue's activities on a regular basis. Kate reviews all outgoing correspondence for written financial advice that Sue provides to her clients. Please contact Kate if you have any questions about Sue's brochure supplement at (510) 528-5820.

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Theodore Tilles, CFP®

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Berkeley, CA 94707

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This brochure supplement provides information about Theodore ("Ted") Tilles that supplements our brochure. You should have received a copy of that brochure. Please contact S. Katherine ("Kate") Campbell, Chief Compliance Officer, if you did not receive North Berkeley Investment Partners, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Tilles is available on the SEC's website at
www.adviserinfo.sec.gov.

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Theodore Tilles

Date of Birth: June 7, 1972

Educational Background:

- Washington University; AB; 1983

Business Background:

- North Berkeley Investment Partners, LLC – Contract Certified Financial Planner, January, 2015 to present
- Self Employed, January 2014 to December 2014
- North Berkeley Investment Partners, LLC – Member, Financial Planning Director, Investment Advisor Representative, July 2005 to January, 2014.
- Protected Investors of America – Registered Representative, March 2005 to July 2005
- Charles Schwab, Inc. – Senior Manager, March 1999 to March 2005
- Start Up – Program Director, November 1997 to March 1999
- Cambridge Systematics – Senior Analyst, August 1994 to November 1997

Professional Designations:

- CFP® - CERTIFIED FINANCIAL PLANNER™



Ted Tilles, CFP®

Ted is a Partner of the firm. Prior to joining the firm in 2005, Ted was a Senior Manager in the Schwab Institutional division of Charles Schwab, ran a program aimed at small business development, and performed economic research for a consulting firm. Ted has been a Partner of the firm since 2011.

Ted completed the Personal Financial Planning certificate program at U.C. Berkeley in 2005, and is a Certified Financial Planner™ Ted is a member of the San Francisco chapter of the Financial Planning Association.

Ted received his A.B. in Economics and Spanish from Washington University. He lives in the Mission district of San Francisco with his wife Naomi and school-aged daughters.



He enjoys swimming in the Bay, riding and fixing bicycles, and his family. To read more about Ted and his bicycling time with his family, visit www.sfbike.org/main/bike-commuting-is-easy-with-kiko-isabel-naomi-and-ted/.

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DISCIPLINARY INFORMATION

Ted Tilles has not been subject to any disciplinary actions through his affiliation with North Berkeley Investment Partners, LLC as regulated by the Securities and Exchange Commission (SEC).

OTHER BUSINESS ACTIVITIES

Ted does not have any other business activities to disclose.

ADDITIONAL COMPENSATION

Ted does not receive economic benefits from a non-client for providing advisory services.

SUPERVISION

S. Katherine ("Kate") Campbell, Chief Compliance Officer of North Berkeley, supervises and monitors Ted's activities on a regular basis. Kate reviews all outgoing correspondence for written financial advice that Ted provides to his clients. Please contact Kate if you have any questions about Ted brochure supplement at (510) 528-5820.