

Firm Brochure
(Part 2A of Form ADV)

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This brochure provides you with information about the qualifications, business practices and nature of advisory services of FUSION INVESTMENT GROUP, LLC ("FIG"), all of which should be considered before becoming an advisory client of our firm. Please contact Scott Dooley, Chief Compliance Officer, at (412) 325-3972 or sdooley@fusioninv.com if you have any questions about this narrative brochure.

The information in this brochure has not been approved or verified by the U.S. Securities and Exchange Commission ("SEC"), or by any state securities authority.

We are an Investment Adviser registered with the U.S. Securities and Exchange Commission ("SEC"). Registration does not imply a certain level of skill or training. Additional information about our firm is available on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. You can search this site by a unique identifying number, known as a CRD number. Our firm's CRD number is 150978.

December 31, 2014

Item 2 Material Change

Annual Update

The SEC adopted “Amendments to Form ADV” in July 2010. This Part 2A of Form ADV (“Firm Brochure”), dated **December 31, 2014**, is our most current document prepared in accordance to the SEC’s new rule requirements and rules. As you will see, this document is narrative format. Consistent with the new rules, we will ensure that you receive a summary of any material changes to this and subsequent Firm Brochures within 120 days of the close of our business’ fiscal year. Furthermore, we will provide you with other interim disclosures about material changes as necessary.

Summary of Material Changes

This Brochure, dated **December 31, 2014**, is the annual update amendment filing Brochure.

During the 2014 calendar year, FIG has the following material changes to report:

1. On August 20, 2014, Firm Brochure with Form ADV as an other-than-annual update amendment to report the departure of Brian S. Sommers and his replacement serving in the role of Chief Compliance Officer, Scott T. Dooley.
2. On August 20, 2014, Firm Brochure with Form ADV as an other-than-annual update amendment to report a change in control persons. R Scott Umstead is no longer a control person or principal owner. He has changed roles from President/CEO to Vice Chairman.

FIG has made no other material changes to structure, personnel, or operations since the last annual update, which was done on **March 28, 2014**.

Full Brochure Available

Whenever you would like to receive a complete copy of our Firm Brochure, please contact us by telephone at 412-325-3972 or by email at: SDOOLEY@FUSIONINV.COM

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Item 4 Advisory Business

A. Firm Description

Fusion Investment Group, LLC ("FIG") is an investment management firm that is registered with the U.S. Securities and Exchange Commission ("SEC") as an investment adviser. It is organized as a Delaware limited liability company that was established on December 30, 2008. FIG's current advisory activities consist of providing discretionary asset management services and investment supervisory services to several investment management vehicles that Fusion Capital Management, LLC ("FCM", or "General Partner") began in 2006.

FIG offers investment supervisory services relative to a number of pooled investment vehicles (the "Funds") that utilize proprietary trading strategies. The Funds are structured as Delaware limited partnerships.

FIG also provides asset management services directly through its Private Access Program and in the form of third party money management services to institutional investors, qualified high net-worth individuals, and financial advisors.

Principal Owners

The Investment Manager, the Fund, the General Partner and FMG are all controlled by the same individuals. The General Partner and Investment Manager are both wholly-owned subsidiaries of Fusion Management Group (FMG). Fusion Management Group, LLC ("FMG") owns Fusion Capital Management (FCM) and Fusion Investment Group (FIG) and a minority stake in ETF Global ("ETF Global"), a leading provider of investment decision support applications, proprietary risk analytics and educational offerings. Scott Dooley is the controlling principal of FMG. In addition to serving as managing member of FCM and FIG, Mr. Dooley is also an executive officer of FIG; Mr. Dooley is Chief Investment Officer (CIO), Chief Executive Officer (CEO) and Chief Compliance Officer (CCO).

B. Types of Advisory Services

1. Adviser to Limited Partnerships (the Fund)

FIG provides investment supervisory services to Global Fusion Partners, L.P. (SEE NOTICE BELOW) a Delaware Limited Partnership operating as a private investment fund. The establishment of Global Fusion Partners, LP was sponsored by general partner, Fusion Capital Management, LLC ("FCM").

Investors in the Fund are limited partners (the "Limited Partners"). Limited Partners must generally be both "**accredited investors**" as defined in Regulation D under the Securities Act of 1933 and "**qualified clients**" as defined in Rule 205-3 under the Investment Advisers Act; provided however, that the Fund may accept up to thirty five (35) non-accredited "sophisticated investors" who have such knowledge and experience in financial matters to evaluate the merits and risks of an investment in the Funds.

NOTICE REGARDING GLOBAL FUSION PARTNERS, LP: Please be advised that Global Fusion Partners, LP is closed and no longer accepting investors. The Fund has liquidated all of its investments, and has reinvested the proceeds into a concentrated investment into Fusion Management Group, LLC ("FMG") and a few other illiquid investments. The investment into FMG will

be made pursuant to a separate Private Placement Memorandum. The Management Fees and Performance Allocation fees listed herein are not applicable to the Global Fusion Partners, LP.

This document is neither an offer to sell nor a solicitation of an offer to buy interests in the Fund. Such an investment may be made only after receipt and review of the Fund's confidential private placement memoranda (the "Memoranda") and execution of certain agreements. Upon request to FCM, a copy of the Memoranda is available to persons meeting the definitions of both accredited investor and qualified client. The Memoranda contains important information concerning risk factors and other material aspects of the Funds and must be read carefully before any decision whether to invest is made. The information in this document is qualified in its entirety by, and should be read in conjunction with, the information contained in the Memoranda.

2. Private Access Program

FIG provides direct advice and discretionary investment management services to qualified clients and institutions in its Private Access Program. This includes Global Fusion Tactical Equity, Global Fusion Core Equity, Fusion Enhanced Equity Income, Global Fusion Total Return, Fusion Short Term Government Bond and several Custom Strategies.

Global Fusion Tactical Equity is an actively managed equity strategy based on a market-weighted allocation process. The benchmarks are the MSCI All Country World Index and HFRX Equity Hedge. Global Fusion Core Equity is a fully invested version of the Tactical Equity and is an actively managed equity strategy based on a market-weighted allocation process. The benchmark is the MSCI All Country World Index and MSCI World Index. Fusion Enhanced Equity Income is an actively managed equity strategy that utilizes covered-call writing to enhance the current income. The benchmarks are the CBOE Buywrite Monthly Index and the S&P 500 Index. Global Fusion Total Return is an actively managed tactical fixed income strategy based on a market weighted allocation process. The benchmarks are the Barclays Global Aggregate Index and Barclays Aggregate Bond Index. Fusion Short Term Government Bond is an actively managed short-term fixed income strategy that invests in high quality, investment grade U.S. Government bonds, agencies and municipal securities. The benchmarks are the Barclays 1-3 Yr U.S. Treasury Index and Barclays Short Treasury 3-6 Month Index.

3. Third Party Money Manager Services ("TPMM")

Under this service, FIG may provide investment management services through accounts established at institutional investment companies that are not affiliated with FIG on their RIA platforms. Similar to the Private Access Program, the various investment portfolios offered include Global Fusion Tactical Equity, Global Fusion Core Equity, Fusion Enhanced Equity Income, Global Fusion Total Return, Fusion Short Term Government Bond and several Custom Strategies. These accounts may be managed on either a discretionary trading basis or a non-discretionary trading basis as agreed to by the client.

4. Sub-Advisory Services

FIG serves as the sub-adviser to unaffiliated registered investment advisors for various investment strategies including those listed under the Private Access Program and TPMM as well as other custom strategies and accounts. We provide investment advisory services to each sub-advised strategy or account based on the underlying Client's investment objectives, goals, restrictions, tax status and risk profile communicated to us by the primary investment adviser.

C. Tailored Relationships

1. The Fund

FIG provides investment advisory services to the Fund based on the investment objectives of the

Fund. **FIG does not provide tailored investment advice to the Limited Partners in the Fund.**

2. Private Access Program/ Third Party Money Manager Services

FIG provides direct, discretionary investment advisory services to qualified clients and institutions. **FIG does not provide tailored investment advice to Private Access Clients. We do not tailor our advisory advice to clients in our Third Party Money Manager Services**

3. Sub-Advisory Services

FIG provides investment advisory services to each sub-advised account based on the underlying Client's investment objectives, goals, restrictions, tax status and risk profile communicated to us by the primary investment adviser. **We will tailor our advice based on each client's taxable situation. For example we may continue to hold low cost basis securities or highly concentrated positions if selling the security would impose a burdensome tax consequence on the client.**

D. Wrap Fee Programs

Wrap Fee Programs are arrangements between broker-dealers, investment advisers, banks and other financial institutions and affiliated and unaffiliated investment advisers through which the Clients of such firms receive discretionary investment advisory, execution, clearing and custodial services in a "bundled" form. In exchange for these "bundled" services, the Clients pay an all-inclusive (or "wrap") fee determined as a percentage of the assets held in the wrap account. FIG is a subadvisor to wrap fee programs sponsored by BPU Investment Management and Mid-Atlantic Financial Management. There is no difference in how these accounts are managed versus any other account Fusion manages. Fusion is paid a fixed percentage of the Assets managed based on which strategy is being managed.

E. Assets Under Management

FIG manages a total of \$164,863,175 in client assets on a discretionary basis and non-discretionary basis. This Asset under Management figure is based on calculations as of December 31, 2014. FIG manages a total of \$134,914,923 on a discretionary basis and \$29,948,252 on a non-discretionary basis.

Item 5 Fees and Compensation

A. Advisory Fees and Billing Procedures

1. Limited Partnerships (the "Fund")

FCM and FIG have waived both the Management Fees and Performance Allocation fees listed in the Private Placement Memorandum for Global Fusion Partners, LP.

2. Private Access Program

FIG earns an investment management fee ("Management Fees") for direct, discretionary investment advisory relationships according to the below schedule calculated by the weighted daily average net assets (securities, cash, and cash equivalents) under management ("Net Assets") of client's account, averaged and billed over the relevant quarter.

FIG (Private Access) Annual Fee Schedule:

Account Range	Fusion Fee	Effective Fee @ Account Value
First \$5,000,000	1.00%	1.00% @ \$5,000,000
Next \$10,000,000	0.75%	0.83% @ \$15,000,000
Over \$15 Million	0.50%	0.67% @ \$30,000,000

Under certain circumstances Fusion's fees may be negotiated.

FIG's fee for its Private Access Program is payable in advance as of the first business day of each quarter and calculated before any accrual for or payment of the Management Fee. FIG is paid by debiting the client's account (provided debiting is authorized in writing by the client), on a date not later than the tenth (10th) business day after the client's receipt of a correct invoice for such management fees.

3. Third Party Money Manager Services

FIG receives compensation in the form of a management fee (the "Management Fee") for discretionary asset management services through institutional platforms. These fees are negotiable. Fees for such services are assessed through the following compensation structures.

(a) Management Fees

(i) FIG earns an investment management fee ("Management Fees") according to the below schedule calculated by the weighted daily average net assets (securities, cash, and cash equivalents) under management ("Net Assets") of client's account, averaged and billed over the relevant quarter.

FIG (Institutional Platforms) Annual Fee Schedule*:

Account Range	Total Maximum Annual Fee	Fusion Fee	Effective Fee @ Account Value
First \$2,000,000	2.00%	0.50%	0.50% @ \$2,000,000
Next \$3,000,000	2.00%	0.45%	0.47% @ \$5,000,000
Over \$5 Million	2.00%	0.40%	0.43% @ \$10,000,000

*FIG households accounts by address of record

*Custom accounts may incur an additional 0.20% fee

(ii) Investment management fees of up to 2% per annum may be charged on separate account assets referred by a solicitor and will be disclosed in a Separate Written Disclosure pursuant to SEC Rule 206(4)-3.

(iii) FIG earns management fees of less than 1% per annum of assets under management for managed accounts which it serves in the capacity of sub-adviser.

(iv) Performance fees/allocations projected to be 10% to 20% of profits (potentially subject to high water mark provisions).

FIG's fee is payable in advance as of the first business day of each quarter and calculated before any accrual for or payment of the Management Fee. FIG is paid by debiting the client's account (provided debiting is authorized in writing by the client), on a date not later than the tenth (10th) business day after the client's receipt of a correct invoice for such management fees.

4. Sub-Advisory Accounts

As noted above in Item 4, FIG also provides investment sub-advisory services to unaffiliated investment advisors for investment strategies and other accounts. The sub-advisory fees that we receive for providing these services are negotiated between us and the principal advisor for each sub-advised strategy or account. FIG sends an invoice to the unaffiliated investment advisor on a date not later than the tenth (10th) business day of the month.

B. Other Fees and Expenses

There may be additional fees or charges that result from the maintenance of or trading within your account. These fees are imposed by third parties in connection with investments made through the your account, including but not limited to, brokerage commissions, no-load mutual fund 12(b)-1 distribution fees, certain deferred sales charges on previously purchased mutual funds, IRA and Qualified Retirement Plan fees, and also acquired fund fees and expenses. For more details on the brokerage commissions please see page 11 of this document, Item 12 -Brokerage Practices.

If you purchase the Mutual Funds through a broker-dealer or other financial intermediary (such as a bank), the Funds and its related companies may pay the intermediary for the sale of Funds' shares and related services. These payments may create a conflict of interest by influencing the broker-dealer or other intermediary and your salesperson to recommend the Funds' over another investment. Ask your salesperson or visit your financial intermediary's website for more information.

C. Refund Policy

General Policy: FIG's advisory services may be terminated (1) at any time by either party hereto after giving to the other at least five (5) business days prior written notice of such termination; or (2) by client, without penalty, upon written notice within five (5) business days after entering into the Agreement. Fees paid in advance will be prorated to the date of termination specified in the notice of termination and any unearned portion thereof will be refunded to client.

D. Other Compensation

FIG does not accept any compensation other than Management Fees and the Performance Allocation Fees as heretofore described.

E. Other Compensation of Supervised Persons

Michael Guy Epstein is licensed as a registered representative to sell securities through Mid-Continent Securities Advisors, Ltd., a registered broker/dealer, member FINRA/SPIC. In this capacity, Mr. Epstein will receive commission-based compensation in connection with the purchase and sales of securities. Compensation earned by Mr. Epstein in his capacity as a registered representative is separate and in addition to our advisory fees. This practice presents a conflict of interest because Mr. Epstein has an incentive to effect securities transactions for the purpose of generating commissions rather than solely based on your needs. Clients are under no obligation, contractually or otherwise, to purchase insurance products through Mr. Epstein. He devotes approximately 60% of his time per week working as a registered representative.

Michael Guy Epstein is licensed as an insurance agent with the State of New Jersey (License Number 1308850) and is licensed to sell life insurance. Mr. Epstein will be affiliated with an independent insurance brokerage firm. He receives commission-based compensation for selling insurance products. Mr. Epstein will offer life insurance products to clients of Fusion. This practice presents a conflict of interest because Mr. Epstein has an incentive to recommend insurance products. Clients are under no obligation, contractually or otherwise, to purchase insurance products through Mr. Epstein. He devotes approximately 10% of his time per week on this business activity.

Item 6 Performance-Based Fees and Side By Side Management

A. Performance-Based Fees

Performance-Based Fees may be used as a method of compensation for advisory services and will be negotiated on a client by client basis and will be fully disclosed in the client agreement.

B. Side-by-Side Management

FIG conducts side-by-side management of pooled investment vehicles and managed accounts. These dissimilar investment products are designed for specific types of clients and diverse methods of management are required. For a number of reasons, including compensation variations and allocation of trades, managing side-by-side products may present FIG with potential conflicts of interest. The conflicts may include the incentive to give preferentiality to performance-based fee transactions over other accounts or intentionally allocating trades to increase value of assets thereby generating higher advisory compensation. To mitigate this conflict of interest, we have developed policies and procedures prohibiting allocation of trades based on favorable or unfavorable market fluctuations. FIG's Chief Compliance Officer will review transactions periodically to prevent and detect preferential trade allocation.

Item 7 Types of Clients

FIG's current client base includes the Fund, Institutional and Individual Investors for separate account management programs. FIG also sub-advises portfolios for Investment Advisors.

FIG generally requires Limited Partners in the Funds and participants in its Private Access and institutional clients programs to commit \$250,000 as a minimum initial investment. We generally require other sub-advised accounts to meet our minimum account size. FIG reserves the right, in its sole discretion, to reduce, or waive the minimum initial investment.

Item 8 Methods of Analysis, Investment Strategies and Risk of Loss

A. Methods of Analysis and Investment Strategies

1. The Fund

The Fund's investment program has changed. The Fund has liquidated all of its investments and has reinvested the proceeds into a concentrated investment into Fusion Management Group, LLC ("FMG") and a few other illiquid investments.

All investment programs have certain risks that are borne by the investor. Investments in the Fund involve a number of significant risks. The risk factors set forth in the Memoranda are those deemed by FIG and FCM to be the most significant. Prospective investors should carefully consider all risks, as

there can be no assurance that the Fund will achieve its investment objective or avoid substantial losses. An investor should not make an investment in the Fund with the expectation of sheltering income or receiving cash distributions.

2. Private Access Program/ Third Party Money Manager Services

FIG's consistent, disciplined investment model utilized in all of its products integrates three key areas central to its decision-making process built on a foundation of risk management: (a) fundamental valuation; (b) behavioral finance; and (c) global themes. FIG's fundamental valuation is a proprietary multifactor model that screens through fundamental data on ETFs, including P/E and P/B ratios, earnings growth, dividend yields and historical risk/return relationships. Behavioral finance involves an analysis of behavioral factors, involving the use of technical research and investor sentiment readings. The global themes approach is an in-depth review of macroeconomic conditions across the world, with a focus on economic indicators, business cycle, and industry/sector trends both domestically and internationally.

FIG has developed a proprietary method of integrating both fundamental analysis and behavioral finance into its security selection process. FIG allocates assets and selects individual ETFs using its Fusion Process® which combines long-term fundamental analysis and short-term tactical/behavioral analysis techniques and applies them to investment opportunities throughout the globe. This rigorous *Fusion Process*® of analyzing global markets has enabled the investment management team to take advantage of one of the fastest growing financial products in the marketplace: Exchange Traded Funds (ETFs).

The Fusion Process® strategy proceeds through the following stages:

(1) Fundamental Valuation

FIG runs proprietary multifactor model screens through fundamental data on the securities with each ETF. Among others, these screens include: price-to-earnings ratio, price-to-book value ratio, earnings growth, dividend yield and historical risk (return volatility)/return relationship.

(2) Behavioral Finance

FIG conducts an analysis of behavioral factors, involving the use of technical research and investor sentiment readings. These measures focus on historical measures of an ETF's price movement relative strength, money flow into an ETF and other moving averages describing price patterns.

(3) Global Economic Analysis

FIG reviews macroeconomic conditions across the world. The review focuses on economic indicators, business cycles, and industry/sector trends to generate an investment outlook for both developed and emerging economies. Next, investment themes for these economies are ranked in order of greatest expected return.

3. Sub-Advised Accounts

FIG provides investment sub-advisory services to unaffiliated investment advisors for other accounts. Additional information regarding the investment objectives, investment strategies, risks and other terms of these sub-advised accounts is available from the principal investment advisor.

B. Material Risks of Analysis and Investment Strategies

1. The Fund

The Fund's investment program has changed. The Fund has liquidated all of its investments and has

reinvested the proceeds into a concentrated investment into Fusion Management Group, LLC ("FMG") and a few other illiquid investments. No assurance can be given that the investment strategies to be used by the Partnership will be successful under all or any market conditions.

Limited Partners in the Partnership should note that the prices of the securities and other instruments in which the Partnership invests may be unavailable. Market movements are difficult to predict and are influenced by, among other things, government trade, fiscal, monetary and exchange control programs and policies; changing supply and demand relationships; national and international political and economic events; changes in interest rates; and the inherent volatility of the marketplace. In addition, governments from time to time intervene, directly and by regulation, in certain markets, often with the intent to influence prices directly. The effects of governmental intervention may be particularly significant at certain times in the financial instrument and currency markets, and such intervention (as well as other factors) may cause these markets and related investments to move rapidly.

2. Private Access Program/ Third Party Money Manager Services / Sub Advisory Services

Risk management is the cornerstone of the FIG philosophy. Notwithstanding the method of analysis or investment strategy employed by our firm, the assets within your portfolio are subject to risk of devaluation or loss. FIG wants you to be aware that there are many different events that can affect the value of your assets or portfolio including, but not limited to, changes in financial status of companies, market fluctuations, changes in exchange rates, trading suspensions and delays, economic reports and natural disasters.

FIG recommends exchange-traded funds ("ETFs") for Client portfolios. FIG also advises with the selection of individual stocks and mutual funds for client portfolios. There are risks associated with investing in these securities, including the risk of a drop in a given market, the risk of a default or decline in the price of an individual security, and the risk of inflation deteriorating the real value of the investment. In addition, there are several risks specific to ETFs:

Market risk: ETFs are typically designed to track the performance of certain indices, market sectors, or groups of assets such as stocks, bonds, or commodities. ETF managers may use different strategies to achieve this goal, but in general they do not have the discretion to take defensive positions in declining markets. Investors must be prepared to bear the risk of loss and volatility associated with the underlying index/assets.

Tracking errors: Tracking errors refer to the disparity in performance between an ETF and its underlying index/assets. Tracking errors can arise due to factors such as the impact of transaction fees and expenses incurred to the ETF, changes in composition of the underlying index/assets, and the ETF manager's replication strategy. The common replication strategies include full replication/representative sampling and synthetic replication which are discussed in detail below.

Trading at discount or premium: An ETF may be traded at a discount or premium to its Net Asset Value (NAV). This price discrepancy is caused by supply and demand factors, and may be particularly likely to emerge during periods of high market volatility and uncertainty. This phenomenon may also be observed for ETFs tracking specific markets or sectors that are subject to direct investment restrictions.

Foreign exchange risk: Investors trading ETFs with underlying assets not denominated in United States dollars are also exposed to exchange rate risk. Currency rate fluctuations can adversely affect the underlying asset value, also affecting the ETF price.

Liquidity risk: Securities Market Makers (SMMs) are Exchange Participants that provide liquidity to facilitate trading in ETFs. Although most ETFs are supported by one or more SMMs, there is no assurance that active trading will be maintained. In the event that the SMMs default or cease to fulfill their role, investors may not be able to buy or sell the product.

While this information provides a synopsis of the events that may affect your investments, this listing is not exhaustive. We want you to understand that there are inherent risks associated with investing and depending on the risk occurrence; you may suffer LOSS OF ALL OR PART OF YOUR PRINCIPAL INVESTMENT.

C. Recommendation of Specific Types of Securities

FIG recommends specific types of securities which include but are not limited to pooled investment vehicles, managed accounts and the mutual funds. These are sophisticated investments designed for investors who have the knowledge and experience in financial matters to evaluate the merits and risks of such investments.

All investments should be formed only as a part of a complete investment program and an investor must be able to bear the loss of its entire investment. Prospective investors are urged to consult with their own financial, tax and legal advisors before investing in the Funds or TPMM programs offered by FIG.

Item 9 Disciplinary Information

Neither FIG, its management nor related persons has been involved in legal nor disciplinary events related to past or present investment clients.

Item 10 Other Financial Industry Activities and Affiliations

A. Financial Industry Activities

FIG is not a registered broker-dealer and does not have an application pending to register as a broker-dealer.

Investment Adviser Representative (IARs) of FIG, are registered representatives of unaffiliated, full-service securities broker/dealer and investment adviser registered under federal and state securities laws. In their capacities as registered representatives, our IARs may offer Clients securities and/or insurance products for which they receive a commission. In this capacity, our IARs are involved in the sale of securities of various types, including, but not limited to stocks, bonds, mutual funds, variable annuities, and limited partnerships. In addition, he may also be involved in the sale of insurance products. As such, these IARs can effect transactions in insurance products for Clients and earn commissions for these activities. The IARs will receive commission- based compensation in connection with the purchase and sales of securities. Compensation earned by our IARs in their capacities as a registered representatives is separate and in addition to our advisory fees. All compensation received by IARs of the Firm for securities transactions through unaffiliated broker/dealers will be separate, yet customary for effecting securities transactions, including 12b-1 fees for the sale of investment company products.

Scott Timothy Dooley and Christopher John Romano are dually registered as investment advisors with Fusion Investment Group, LLC and Partnervest Financial Group. They each receive no compensation

from Partnervest.

B. Financial Industry Affiliations

FIG is not registered as, and does not have pending applications to register as, a Futures Commission Merchant, Commodity Pool Operator, or Commodity Trading Advisor. Furthermore, none of FIG's management or supervised persons is registered as, or has an applications pending to register as, associated persons of the foregoing entities.

C. Other Material Relationships

Fusion Investment Group (FIG) is a wholly owned entity of Fusion Management Group (FMG). FCM is the General Partner of the Funds; all entities are under common control by nature of Mr. Dooley's ownership of both entities. Additionally both entities are owned by Fusion Management Group, LLC (FMG.)

FMG is issuing investment interests to Limited Partners in Global Fusion Partners, LP pursuant to a side letter arrangement. FMG is the sole shareholder of Fusion Capital Management (FCM) and Fusion Investment Group. The Fund's investment in FMG will carry substantial risks and may result in a loss of the Fund's entire investment.

Guy Epstein is licensed as a registered representative to sell securities through Mid-Continent Securities Advisors, Ltd., a registered broker/dealer, member FINRA/SPIC. Guy, as an Investment Adviser Representative and in his individual capacity as a licensed insurance agent, may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Epstein to effect insurance transactions on a commission basis. The recommendation by Mr. Epstein that a Client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular Client's need. No Client is under any obligation to purchase any commission products from Guy Epstein.

Our Memorandum contains explicit information concerning important conflicts of interest and other material aspects of the Fund. The Memorandum must be read carefully before making any decision regarding investing. The information herein is qualified in its entirety by, and should be read in conjunction with, the information contained in the Memorandum.

D. Other Investment Advisers

FIG serves as the subadvisor to unaffiliated registered investment advisors for other accounts.

FIG may execute agreements with other investment advisers and recommend other advisers' services to Clients. The selected unaffiliated investment advisers will act as third-party money managers. In such instances, FIG may receive a portion of the adviser's services fee.

Item 11 Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

A. Description of Code of Ethics

All employees of FIG must act in an ethical and professional manner. In view of the foregoing and applicable provisions of relevant law, FIG has adopted a Code of Ethics to specify and prohibit certain types of transactions deemed to create conflicts of interest (or the potential for or the

appearance of such conflicts), and to establish reporting requirements and enforcement procedures relating to personal trading by FIG personnel. FIG's Code of Ethics, which specifically deals with professional standards, insider trading, personal trading, gifts and entertainment, and fiduciary duties, establishes ideals for ethical conduct based upon fundamental principles of openness, integrity, honesty, and trust. We will provide a copy of our Code of Ethics to any client or prospective client upon request.

B. Participation or Interest in Client Transactions

FIG recommends to its investment advisory clients or prospective investment advisory clients who are qualified clients as defined by SEC 275.205-3, the purchase or sale of the interests in the Funds. FIG earns both a management fee and a performance-based incentive fee from the Funds and management fees from managed account services. FIG will provide written notification to clients advising of such conflicts of interest.

C. Proprietary /Simultaneous Trading

At times, FIG and/or its supervised persons (i.e., Investment Adviser Representatives) may buy or sell securities for their own accounts that we have also recommended to our Clients. This presents a conflict of interest. In any instance where similar securities are being bought or sold, we will uphold our fiduciary duty by always transacting on behalf of our Clients before transacting for our own benefit. It is the policy of FIG that supervised persons must avoid security transactions and activities for their own accounts that might conflict with or be detrimental to the interest of the Clients. To the extent supervised persons are aware of trades in individual issues being considered, recommended, or traded for the Client Accounts, the supervised persons will make every effort to trade in their own accounts after trades are executed for the Clients. To mitigate or remedy any conflicts of interest or perceived conflicts of interest, we will monitor our proprietary and personal trading reports for adherence to our Code of Ethics. FIG will always document any transactions that present conflicts of interest. In any instance where similar securities are being bought or sold, we will uphold our fiduciary duty by always transacting on behalf of our Clients before transacting for our own benefit.

Item 12 Brokerage Practices

A. Selection and Recommendation

1. The Fund

Due to the change in the fund's investment strategy, the fund is currently not subject to any brokerage commissions or fees.

2. Private Access Program/ Third Party Money Manager Services

FIG may have discretion or make recommendations with respect to the selection of brokers. The objective in selecting brokers and dealers and in effecting portfolio transactions is to seek to obtain the best combination of price and execution with respect to a fund's portfolio transactions even though such execution may involve higher costs than might be available elsewhere. The best net price, giving effect to brokerage commissions, spreads and other costs, is normally an important factor in this decision, but a number of other judgmental factors are considered as they are deemed relevant.

The factors may include, but are not limited to:

- Knowledge of negotiated commission rates and spreads currently available.
- The nature of the security being traded.
- The size and type of the transaction.
- The nature and character of the markets for the security to be purchased or sold.
- The desired timing of the trade.
- The activity existing and expected in the market for the particular security.
- Confidentiality.
- The execution, clearance and settlement capabilities of the broker-dealer.
- Broker-dealer's access to order flow and ability to place difficult trades.
- The reputation and perceived soundness of the broker-dealer selected.
- Knowledge of actual or apparent operational problems of any broker-dealer.
- The broker-dealer's execution services rendered on a continuing basis and in other transactions.
- The reasonableness of the spreads and commissions.
- Provision of research or other information.

Transactions may involve specialized services on the part of the broker-dealer involved resulting in higher commissions or their equivalents than would be the case with transactions requiring more routine services. The reasonableness of commissions is based on the broker-dealer's ability to provide professional services, competitive commission rates, research and other services that will help in providing investment management or advisory services.

FIG utilizes Fidelity Investments a registered broker-dealer, a member of the Financial Industry Regulatory Authority, Inc. ("FINRA") and the Securities Investor Protection Corp. ("SIPC"), to provide brokerage services to the TPMM programs participants.

B. Soft Dollars

FIG has not received research or other products or services other than execution from a broker-dealer or a third party in connection with client securities transactions. It has not generated "soft dollars" benefits as of the date of this Brochure.

C. Brokerage for Client Referrals

FIG does not receive client referrals from third parties for recommending the use of specific broker-dealer's services.

D. Directed Brokerage

1. The Fund

FIG investment advisory services involve managing a pooled investment vehicle, heretofore described as, the Fund. Due to the structure of pooled investment vehicles, directed brokerage arrangements are not applicable to nor affect the investment management policies of FIG.

2. Private Access Program

(a) FIG routinely recommends that clients utilize Fidelity Investments. Our arrangement with Fidelity is designed to maximize efficiency and cost effectiveness for our clients. By requiring clients to use our specific custodian, we seek to achieve most favorable results relative to costs, trade allocation, and rebalancing client assets.

(b) Although not all advisers require their clients to direct brokerage, FIG also permits clients to direct brokerage. If clients have their own preferred broker-dealer, we will notify the broker-dealer of our advisor-client relationship. Please be aware, however, when clients are permitted to direct brokerage, we may not be able to effect transactions in the most cost effective manner. Furthermore, we may be limited in our ability to aggregate transactions and clients may in turn, incur greater costs associated with brokerage transactions.

3. Third Party Money Managers Services

Currently, FIG has entered into arrangements with broker-dealers that offer RIA platforms. Accounts established through the broker-dealers will be managed by FIG.

E. Order Aggregation

FIG may, at times, aggregate sale and purchase orders of securities for the TPMM and Private Access accounts with similar orders for the other accounts in order to obtain the best pricing averages and minimize trading costs.

FIG aggregates order when the same security is being traded across multiple accounts at the same broker. FIG will not aggregate single orders or between two or more brokerage firms. This practice is reasonably likely to result in administrative convenience or an overall economic benefit to these programs based on an evaluation that the accounts are benefited by relatively better purchase or sale prices, lower commission expenses or beneficial timing of transactions or a combination of these and other factors. Our policies and procedures mandate aggregating multiple orders and aggregate orders will be allocated to accounts in a systematic non-preferential manner.

Item 13 Review of Accounts

A. Periodic Reviews

FIG reviews the TPMM and Private Access programs and the Fund's investment program including current holdings, on a continual basis. FIG reviews the TPMM and Private Access accounts and the Fund's investment program to analyze rates of return, allocation of assets and to verify that the Funds' portfolio is consistent with its investment objective. The reviews are conducted by Scott Dooley, the Chief Investment Officer (CIO) of FIG.

B. Other Review Factors

Reviews may also be triggered by substantial market fluctuation, economic or political events, or by changes in your financial status (such as retirement, termination of employment, relocation, or inheritance).

Clients are advised to notify FIG promptly if there are any material changes to their financial situation, investment objectives, or in the event they wish to place restrictions on their account.

C. Reports

FIG provides every Limited Partner in the Fund with written, audited reports reviewing the Fund's

investment activities, beginning balances, and annual performance within 120 days of the end of the fiscal year.

Clients who invest in the TPMM and Private Access Program, will receive a monthly brokerage account statements and a quarterly performance report that includes a Management Fee Notification, showing the Average Daily Balance, the computed fee, any adjustment to the fee with explanations for such, and the net fee to be deducted at the beginning of the billing period from the client's brokerage account. All investment statements showing account activity and balances are provided online by Fidelity Investments on a monthly basis.

Item 14 Client Referrals and Other Compensation

A. Economic Benefits for Advisory Services Rendered

The Firm does not receive an economic benefit (such as sales awards or other prizes) from any third party for providing investment advice or other advisory services to its clients.

B. Compensation for Client Referrals

Selling remuneration or referral fees may be paid in connection with any referral of a potential TPMM program client who becomes a client of FIG. In such instance, FIG may reallocate a portion of its Management Fee to third parties who have made such introductions, or FIG may use its own resources to compensate third parties for such introductions.

Item 15 Custody

Custody means holding, directly or indirectly, client funds or securities, or having any authority to obtain possession of them.

A. Custodian of Assets

1. The Fund

FIG does not have physical custody of client assets nor does it provide custodial services to its Clients. Although FIG does not have physical custody of assets, FIG is generally deemed to have custody because our affiliated or related persons serve as the general partners or managing members of the Fund. Further, FIG has indirect custody of client assets because it has the ability to deduct advisory fees payable to it, and has a general power of attorney over the Funds' accounts. Accordingly, FIG will (1) follow all applicable custody rules and/ or regulations and (2) amend its Form ADV and Brochure as required.

2. Private Access Program/ Third Party Money Manager Services

FIG has indirect custody of client assets because it has the ability to deduct advisory fees payable to it. FIG does not have physical custody of Client assets; however it is deemed to have custody over Clients accounts under the federal securities laws because FIG's investment management agreement typically permits us to deduct management fees from the Client account. In this case, FIG submits an invoice for management fees directly to the custodian, and FIG sends the Clients a quarterly statement identifying the amount of the management fee and the manner in which it was calculated.

The physical assets of the Funds, TPMM and Private Access Program participants are held in an account with qualified custodians. See Item 12 for additional information.

B. Account Statements

Statements for TPMM and Private Access Program participants will be mailed or made available electronically by the account custodian. These statements should be reviewed carefully, comparing asset values, holdings, and advisory fees to that in previously received statements, confirmations, and advisory fee invoices.

The Fund is subject to an annual audit by an accountant that is registered with and subject to regular inspection by the Public Company Accounting Oversight Board ("PCAOB"). The audited financial statements are distributed to Limited Partners within 120 days of the end of the Fund's fiscal year.

Item 16 Investment Discretion

FIG is not limited in its authority to purchase securities for the Fund, TPMM, Private Access Programs, or Sub Advisory Programs. FIG has full discretion and authority to make all investment decisions with respect to the types of securities to be bought or sold or the amount of securities to be bought or sold for the Funds, TPMM or Private Access Programs. FIG also has the discretion to select the brokers used and to negotiate the commissions paid to the brokers in the trading of client accounts. Each client must sign a written Discretionary Investment Management Agreement before FIG assumes discretionary authority.

Item 17 Voting Client Securities

Private Access Program/ Third Party Money Manager Services / Sub Advisory Services

In general, FIG will not vote nor advise clients how to vote proxies for client securities held in the TPMM and Private Access Program. Clients are responsible for directing their own proxies solicited by issuers of securities, including making elections relative to any mergers, acquisitions, tender offers, bankruptcy proceedings and other types of events pertaining to the securities in your account. Clients will receive proxy and other solicitation information by mail from the account custodian. In addition, the Firm will not take any action or render any advice with respect to any securities held in any accounts that are named in or subject to class action lawsuits. FIG will, however, forward to Client any information received by the Firm regarding class action legal matters involving any security held in the Account.

Item 18 Financial Information

A. Balance Sheet Requirement

A balance sheet is not required to be provided because FIG does not serve as qualified custodian for client's funds or securities, and does not require prepayment of fees of more than \$1,200 per client, six (6) months or more in advance.

B. Discretionary Authority, Custody of Client Funds or Securities, and Financial Condition

As noted in Item 15, FIG has indirect custody of client assets because FIG has the ability to deduct advisory fees payable to it.

FIG was formed in 2008. While FIG has generated a small amount of net income in its first three years

of operation, Fusion Management Group, LLC (“FMG”), its corporate parent, has generated operating losses. FMG has funded its operations from a combination of loans from friends and family and the issuance of preferred stock, of which one of the largest purchasers is a fund managed by FIG (of which the investors are friends and family). Despite the operating losses of FMG, FMG and FIG believe they have sufficient funding to continue operations, and a sufficient ability to reduce their operating expenses if funding is interrupted for some reason.

C. Bankruptcy Petition Filings

The Firm has not been the subject of a bankruptcy petition at any time during the last 10 years.

PRIVACY POLICY

FIG considers customer privacy to be a fundamental aspect of its relationship with its clients. FIG is committed to maintaining the confidentiality, integrity, and security of its current, prospective and former clients' personal information. FIG does not disclose nonpublic personal information about its clients or former clients to any persons other than as described below. FIG collects information about its clients (such as name, address, social security number, assets and income) from discussions with clients, from documents that clients may deliver to FIG (such as account applications) and in the course of providing services. In order to service its client accounts and effect client transactions, FIG may provide client personal information to its affiliates and to firms that assist it in servicing client accounts and which have a need for such information. FIG does not otherwise provide information about its clients to outside firms, organizations or individuals except as required by law. Any party that receives this information will use it only for the services and as allowed by applicable law or regulations, and is not permitted to share or use this information for any other purpose.

NOTICE:

This grouped brochure supplement provides information about the Investment Adviser Representatives of Fusion Investment Group, LLC. You should have received a copy of the Brochure for Fusion Investment Group, LLC, CRD No. 150978 as well. Please contact Scott Dooley, Chief Compliance Officer, if you did not receive Fusion Investment Group, LLC's brochure. You can also contact Mr. Dooley if you have any questions about the content of the attached supplements.

Brochure Supplements

(Parts 2B of Form ADV)

FUSION INVESTMENT GROUP, LLC

429 Forbes Ave, Suite 300

Pittsburgh, Pennsylvania 15219

Telephone: 412-325-3970

Fax: 866-728-1798

Email:

SDOOLEY@FUSIONINV.COM

December 31, 2014

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Michael Guy Epstein - Brochure Supplement (Part 2B of Form ADV)

Scott Timothy Dooley, CFA

Brochure Supplement

FUSION INVESTMENT GROUP, LLC

429 Forbes Ave, Suite 300

Pittsburgh, Pennsylvania 15219

Telephone: 412-325-3972

Fax: 866-728-1798

Email:

sdooley@fusioninv.com

This brochure supplement provides information about Scott Timothy Dooley that supplements the Fusion Investment Group, LLC's brochure. You should have received a copy of that brochure. Please contact Scott Dooley, Chief Compliance Officer, at 412-325-3972 if you did not receive Fusion Investment Group, LLC's brochure or if you have any questions about the content of these attached supplements.

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

December 31, 2014

Item 2 Education and Business Experience

A. General Requirements

Generally, Fusion Investment Group, LLC ("FIG") requires employees to have relevant working experience in the securities industry. Any employee of FIG acting in a representative capacity will be appropriately licensed and registered as such.

B. Educational Background and Business Experience

Scott Timothy Dooley, CFA

Chief Investment Officer/CEO/CCO

CRD No. 4225054

Year of Birth: 1977

Professional Designation:

Scott Timothy Dooley has earned the Chartered Financial Analyst ("CFA") designation and is a member of the CFA Institute. The Chartered Financial Analyst ("CFA") is a professional designation conferred by the CFA Institute. Designed for financial analysts, the CFA Program is a graduate-level self-study program that combines a broad-based curriculum of investment principles with professional conduct requirements. Candidates are required to pass three levels of examinations, each culminating in a six-hour exam, covering areas such as accounting, economics, portfolio management, security analysis, and ethics. To earn a CFA Charter, an individual must have four years of qualified investment work experience, hold at least a bachelor's degree, become a member of the CFA Institute, pledge to adhere to the CFA Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society and complete the CFA Program.

Business Experience:

Recognized by the business editors of *Institutional Investor News* as one of the "20 Rising Stars of Hedge Funds", Mr. Dooley has been managing client assets in various capacities since 2000. He is responsible for all investment decisions including portfolio construction and security selection. Mr. Dooley continually innovates and develops portfolio techniques utilizing Exchange Traded Funds (ETFs), taking advantage of the explosive growth in these powerful instruments. He has a BS degree with Honors in Finance from Grove City College and an MBA from the University of Chicago - Booth School of Business. Mr. Dooley has earned the Chartered Financial Analyst ("CFA") designation and is a member of the CFA Institute and CFA Society of Pittsburgh.

Item 3 Disciplinary Information

Scott Timothy Dooley does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

Item 4 Other Business

Activities

Scott Timothy Dooley is dually registered as an investment advisor with Fusion Investment Group, LLC and Partnervest Financial Group. Scott receives no compensation from Partnervest.

Item 5 Additional

Compensation

Scott Timothy Dooley does not receive any economic benefit from any third party for providing investment advisory services.

Item 6 Supervision

Scott Dooley, CFA is the firm's Chief Investment Officer/CEO/CCO. He is responsible for the overall firm's supervision and operations.

To contact Mr. Dooley, please refer to his individual Supplemental Brochure cover page.

Item 7 Requirements for State-Registered Advisers

A.1 Arbitration Claims

None. Scott Timothy Dooley has not been found liable in any arbitration claim alleging damages in excess of \$2,500 involving an investment or investment-related business or activity, fraud, false statements, or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting or extortion, or dishonest, unfair or unethical practices.

A.2 Self-Regulatory Organization or Administrative Proceedings

None. Scott Timothy Dooley has not been involved in an award or otherwise found liable in any civil, self-regulatory organization, or administrative proceeding involving an investment or investment-related business or activity, fraud, false statements or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting, or extortion, or dishonest, unfair or unethical practices.

B. Bankruptcy Petitions

None. Scott Timothy Dooley has not been the subject of a bankruptcy petition at any time during the last 10 years.

Christopher John Romano, CFA

Brochure Supplement

FUSION INVESTMENT GROUP, LLC

429 Forbes Ave, Suite 300

Pittsburgh, Pennsylvania 15219

Telephone: 800-516-1165

Fax: 866-728-1798

Email: cromano@fusioninv.com

This brochure supplement provides information about Christopher John Romano that supplements the Fusion Investment Group, LLC's brochure. You should have received a copy of that brochure. Please contact Scott Dooley, Chief Compliance Officer, at 412-325-3972 if you did not receive Fusion Investment Group, LLC's brochure or if you have any questions about the content of these attached supplements.

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

December 31, 2014

Item 2 Education and Business Experience

A. General Requirements

Generally, Fusion Investment Group, LLC ("FIG") requires employees to have relevant working experience in the securities industry. Any employee of FIG acting in a representative capacity will be appropriately licensed and registered as such.

B. Educational Background and Business Experience

Christopher John Romano, CFA

Director of Research and Trading

CRD No. 4587027

Year of Birth: 1979

Professional Designation:

Chris has earned the Chartered Financial Analyst ("CFA") designation and is a member of the CFA Institute and CFA Society of Pittsburgh.

The Chartered Financial Analyst ("CFA") is a professional designation conferred by the CFA Institute. Designed for financial analysts, the CFA Program is a graduate-level self-study program that combines a broad-based curriculum of investment principles with professional conduct requirements. Candidates are required to pass three levels of examinations, each culminating in a six-hour exam, covering areas such as accounting, economics, portfolio management, security analysis, and ethics. To earn a CFA Charter, an individual must have four years of qualified investment work experience, hold at least a bachelor's degree, become a member of the CFA Institute, pledge to adhere to the CFA Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society and complete the CFA Program.

Business Experience:

Chris is responsible for the research and design of quantitative models, along with the development and implementation of trading processes and systems for the firm's products. He joined Blue Vase Securities, LLC in 2002 as System Administrator and brokerage support. He was an integral part of every department within the firm; working with the trading desk, constructing a new commission system for the RIA Division, while overseeing the functionality of the computer systems. Chris joined ITS Asset Management's IT Department in 2004 and was responsible for overseeing that department even while his primary function at the firm was his position as a Member of ITS's Investment Advisory Committee providing insight and analytical information to be used for upcoming asset allocations.

He obtained his Bachelor of Science degree in Information Science with a minor in Business from the University of Pittsburgh, where he graduated Magna Cum Laude in 2002

Item 3 Disciplinary Information

Christopher John Romano does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

Item 4 Other Business Activities

Christopher John Romano is dually registered as an investment advisor with Fusion Investment Group, LLC and Partnervest Financial Group. Chris receives no compensation from Partnervest.

Item 5 Additional Compensation

Christopher John Romano does not receive any economic benefit from any third party for providing investment advisory services.

Item 6 Supervision

Christopher John Romano, CFA is the firm's Director of Research and Trading. He is supervised by Scott Dooley, Chief Compliance Officer, who is responsible for the administration of the firm's supervision and operations. To contact Mr. Dooley, please call 412-325-3972.

To contact Mr. Romano, please refer to his individual Supplemental Brochure cover page.

Item 7 Requirements for State-Registered Advisers

A.1 Arbitration Claims

None. Christopher John Romano has not been found liable in any arbitration claim alleging damages in excess of \$2,500 involving an investment or investment-related business or activity, fraud, false statements, or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting or extortion, or dishonest, unfair or unethical practices.

A.2 Self-Regulatory Organization or Administrative Proceedings

None. Christopher John Romano has not been involved in an award or otherwise found liable in any civil, self-regulatory organization, or administrative proceeding involving an investment or investment-related business or activity, fraud, false statements or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting, or extortion, or dishonest, unfair or unethical practices.

B. Bankruptcy Petitions

None. Christopher John Romano has not been the subject of a bankruptcy petition at any time during the last 10 years.

Michael Guy Epstein

Brochure Supplement

FUSION INVESTMENT GROUP, LLC

21 Kenwood Road

Tenafly, New Jersey 07670

Telephone: 201-567-1673

Fax: 201-567-1673

Email: guv Epstein@fusioninv.com

This brochure supplement provides information about Michael Guy Epstein that supplements the Fusion Investment Group, LLC's brochure. You should have received a copy of that brochure. Please contact Scott Dooley, Chief Compliance Officer, at 412-325-3972 if you did not receive Fusion Investment Group, LLC's brochure or if you have any questions about the content of these attached supplements.

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

December 31, 2014

Item 2 Education and Business Experience

A. General Requirements

Generally, Fusion Investment Group, LLC ("FIG") requires employees to have relevant working experience in the securities industry. Any employee of FIG acting in a representative capacity will be appropriately licensed and registered as such.

B. Investment Adviser Representative

Information Michael Guy Epstein, Investment Adviser
Representative CRD No. 5547573
Year of Birth: 1952

Educational Background:

BA, University of South Carolina, Columbia, SC	1970 - 1974
MBA, University of Georgia, Athens, GA	1980 - 1983

Business Experience:

Investment Adviser Representative Fusion Investment Group, LLC Tenaflly, NJ	2011 - Present
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Registered Representative Mid-Continent Securities Advisors, Ltd., Houston, TX	2012 - Present
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Registered Representative Samuels Chase & Co., Inc., Ramona, CA	2008 - 2012
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Owner GE Capital Advisors, Tenaflly, NJ	2004 - 2011
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Investment Adviser Representative Investment Research Corp., Denver, CO	2008 - 2009
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Financial Advisor First Allied Securities Inc., San Diego, CA	2008 - 2008
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Registered Representative Samuels Chase & Co., Inc., Ramona, CA	2008 - 2008
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Chief Marketing Officer MCM Associates, New York, NY	2004 - 2005
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Chief Operating Officer Mindshare Ventures, New York, NY	2000 - 2004
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Item 3 Disciplinary Information

Michael Guy Epstein does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

Item 4 Other Business Activities

Michael Guy Epstein is licensed as a registered representative to sell securities through Mid-Continent Securities Advisors, Ltd., a registered broker/dealer, member FINRA/SPIC. In this capacity, Mr. Epstein will receive commission-based compensation in connection with the purchase and sales of securities. Compensation earned by Mr. Epstein in his capacity as a registered representative is separate and in addition to our advisory fees. This practice presents a conflict of interest because Mr. Epstein has an incentive to effect securities transactions for the purpose of generating commissions rather than solely based on your needs. He will devote approximately 60% of his time per week working as a registered representative.

Michael Guy Epstein is licensed as an insurance agent with the State of New Jersey (License Number 1308850) and is licensed to sell life insurance. Mr. Epstein will be affiliated with an independent insurance brokerage firm. He will receive commission-based compensation for selling insurance products. Mr. Epstein will offer life insurance products to clients of Fusion. This practice presents a conflict of interest because Mr. Epstein has an incentive to recommend insurance products to you. You are under no obligation, contractually or otherwise, to purchase insurance products through Mr. Epstein. He will devote approximately 10% of his time per week on this business activity.

Item 5 Additional Compensation

Other than noted above in Item 4, Michael Guy Epstein does not receive any additional economic benefit from any third party for providing advisory services.

Item 6 Supervision

Michael Guy Epstein is one of the firm's Investment Adviser Representatives. He is supervised by Scott Dooley, Chief Compliance Officer, who is responsible for the administration of the firm's supervision and operations. To contact Mr. Dooley, please call 412-325-3972.

To contact Mr. Epstein, please refer to his individual Supplemental Brochure cover page.

Item 7 Requirements for State-Registered Advisers

A.1 Arbitration Claims

None. Michael Guy Epstein has not been found liable in any arbitration claim alleging damages in excess of \$2,500 involving an investment or investment-related business or activity, fraud, false statements, or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting or extortion, or dishonest, unfair or unethical practices.

A.2 Self-Regulatory Organization or Administrative Proceedings

None. Michael Guy Epstein has not been involved in an award or otherwise found liable in any civil, self-regulatory organization, or administrative proceeding involving an investment or investment-related business or activity, fraud, false statements or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting, or extortion, or dishonest, unfair or unethical practices.

B. IAR Bankruptcy Petitions

None. Michael Guy Epstein has not been the subject of a bankruptcy petition at any time during the last 10 years.