



Robasciotti & Philipson

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ELLA TAYLOR

This brochure supplement provides information about Ella Taylor that supplements the Robasciotti & Philipson brochure. You should have received a copy of that brochure. Please contact Chief Compliance Officer, Cassandra “Sandy” Holmes if you did not receive Robasciotti & Philipson’s brochure or if you have any questions about the contents of this supplement. Additional information about Ella Taylor is available on the SEC’s website at www.adviserinfo.sec.gov.



Item 2 – Educational Background and Business Experience

Elizabeth (Ella) Elsa Taylor

Year Born: 1981

Educational Background

Executive Certificate in Financial Planning – California State University, San Francisco (2011)

Bachelor of Science, Business Administration & Finance – California State University, San Francisco (2010)

Associate of Arts, Entrepreneurship – Albuquerque Technical Vocational Institute (2004)

Business Background

November 2015 – Present: Wealth Manager, Robasciotti & Philipson

October 2014 – November 2015: Financial Planner, Asti Financial Management

March 2015 – September 2015: Financial Planner, Curtis Financial Planning, LLC

May 2011 – October 2014: Senior Analyst, Brighton Jones, LLC

Professional Qualifications

CERTIFIED FINANCIAL PLANNER™ certification (2013)

CFP® certification is granted by the CFP® Board and requires a bachelor's degree (or higher) or its equivalent from an accredited college or university, completing a CFP® Board-Registered Program or its equivalent, passing the comprehensive CFP® Certification Exam, and 6,000 hours of professional experience related to the financial planning process.

Item 3 – Disciplinary Information

Registered investment 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 for Ella Taylor.

Item 4 – Other Business Activities

Other than for Robasciotti & Philipson, Ella Taylor receives no investment-related compensation nor is she actively engaged in any other business or occupation for compensation that provides a substantial source of income.

Item 5 – Additional Compensation

Ella Taylor does not receive commissions, performance based fees, or any compensation other regular salary and bonuses from Robasciotti & Philipson.

Item 6 – Supervision

Robasciotti & Philipson has appointed a Chief Compliance Officer, Cassandra “Sandy” Holmes, who reviews and monitors employee activity with respect to the rules and regulations. In addition, Robasciotti & Philipson has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact Cassandra “Sandy” Holmes at the address or telephone number on the cover page of this document.