



# SIZEMORE CAPITAL MANAGEMENT

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## Charles Lewis Sizemore, CFA

Supplement to Sizemore Capital Management LLC Form ADV Part II

Principal of Sizemore Capital Management LLC  
Registered Investment Adviser

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As of January 7, 2024

By Charles Lewis Sizemore, CFA

**This brochure supplement provides information about Charles Lewis Sizemore, CFA that supplements the Sizemore Capital Management brochure. You should have received a copy of that brochure. Please contact Sizemore Capital Management LLC at the address listed above if you did not receive the brochure or if you have any questions about the contents of this supplement.**

**Additional information about Charles Lewis Sizemore, CFA is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Educational Background and Business Experience

Charles Sizemore, CFA was born June 3, 1977 in Dallas, TX. Mr. Sizemore earned a bachelor's degree in business administration with a major in finance with an international emphasis from Texas Christian University in Fort Worth, TX in 2000, where he graduated Magna Cum Laude and as a Phi Beta Kappa scholar. Mr. Sizemore earned a master's degree in finance and accounting from the London School of Economics and Political Science in London, United Kingdom in 2004. Mr. Sizemore is a regular contributor to several prominent financial publications and is a holder of the Chartered Financial Analyst designation.

From September 2004 to December 2010, Mr. Sizemore was employed as an investment analyst by HS Dent Investment Management, and SEC-registered RIA firm.

In March of 2008, Mr. Sizemore founded Sizemore Capital Management, where he continues to serve as Managing Member, Chief Investment Officer and Chief Compliance Officer.

From September 2014 to March 2020, Mr. Sizemore was employed by Dent Research as an editor and writer.

From January 2021 to September 2023, Mr. Sizemore was employed by Banyan Hill Publishing as an editor and writer.

From September 2023 until the present, Mr. Sizemore was employed by Alta, a division of MarketWise, Inc., as an editor and writer.

Mr. Sizemore's other experience can be found in the Other Business Activities section of this disclosure.

## Designations

Chartered Financial Analyst (CFA®)	2007
CFA Institute	

## Minimum Designation Requirements

### Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst (CFA®) certification is a globally recognized, graduate-level investment credential, recognized for its foundation in investment analysis and portfolio management skills, and emphasizes the highest ethical and professional standards. To attain the right to use the CFA® marks, an individual must satisfactorily fulfill the following requirements:

**Prerequisites/Experience:** Complete either an undergraduate degree and four years of professional experience involving investment decision-making, or four years of qualified work experience (full time, but not necessarily investment related).

**Educational Requirements:** Complete a self-study program (250 hours of study for each of the three levels).

**Examination Type:** Pass the comprehensive CFA® Certification Examination. The examination consists of three comprehensive exams which are six hours in length each.

**Ethics:** Agree to be bound by CFA Institute's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFA® professionals.

CFA® professionals who fail to comply with the above standards and requirements may be subject to CFA Institute's enforcement process, which could result in suspension or permanent revocation of their CFA® certification.

## **Disciplinary Action**

Charles Lewis Sizemore, CFA is not currently subject to any disciplinary actions by state, federal or industry regulators, nor has he been subject to any historical disciplinary actions.

## **Other Business Activities**

In addition to his responsibilities at Sizemore Capital Management, Charles Lewis Sizemore, CFA regularly produces articles and other content for various financial news sites, including, but not limited to, Kiplinger, InvestorPlace, Forbes, and MarketWatch.

Securities discussed in these publications will often times be owned by Sizemore Capital Management clients and personnel. However, Sizemore Capital Management's policies and procedures concerning brokerage practices and participation apply here, and no inherent conflicts of interest exist. Mr. Sizemore discloses any ownership or interest in any security mentioned in his publications and does not engage in any trading behavior that would be considered unethical or illegal.

Charles Sizemore works in partnership with Robertson Wealth Management to provide money management services to Robertson clients. The portfolios managed for Robertson Wealth Management are substantially similar to those managed for Sizemore Capital Management clients.

Charles Sizemore joined the team of financial publisher Alta in 2023 to assist in the writing and publication of company content. He currently serves as Chief Investment Strategist of the Freeport Society.

Charles Sizemore, through a partnership with HS Dent Publishing LLC, additionally publishes the *Sizemore Income Letter* newsletter.

Charles Sizemore additionally serves as a Director of FTM Limited, an alternative investment manager specializing in medical accounts receivables. In this role Mr. Sizemore advises the executive team but does not participate in the day to day management of the company.

Writing and research take a substantial amount of Mr. Sizemore's time, though much of the time spent researching securities and investment opportunities overlaps with the research done

in managing client accounts at Sizemore Capital Management and in no way adversely affect Sizemore Capital Management clients.

In addition to its status as a registered investment advisory firm, Sizemore Capital Management is registered as a Commodity Trading Advisor (CTA) and Commodity Pool Operator (CPO). Mr. Sizemore holds a Series 3 license and handles administration and compliance for all CTA and CPO activities.

## **Additional Compensation**

Charles Sizemore is a writer and research analyst for the financial publisher Alta and receives a regular salary. Charles Sizemore also periodically receives payments for article submissions to Kiplinger's, InvestorPlace.com and other publications and receives royalties from HS Dent Publishing for the publication of the *Sizemore Income Letter*.

## **Supervision**

Charles Lewis Sizemore, CFA is the sole owner of Sizemore Capital Management; as such, no internal supervision is required, though Mr. Sizemore is required to follow all applicable laws and industry regulations and to satisfy the requirements of his CFA Charter.