

Item 1: Cover Page

Patel Capital Management LLC

1999 Green Street Unit 105
San Francisco, CA 94123
(415) 867-4301

Form ADV Part 2B – Brochure Supplement

Dated: October 30, 2024

For

Shailesh Patel

Member and Chief Compliance Officer

This brochure supplement provides information about Shailesh Patel that supplements the Patel Capital Management LLC (“PCM”) brochure. You should have received a copy of that brochure. Please contact Shailesh Patel if you did not receive PCM’s brochure or if you have any questions about the contents of this supplement.

Additional information about Shailesh Patel is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 4593743.

Item 2: Educational Background and Business Experience

Shailesh Patel

Born: 1970

Educational Background

- 2002 – MS - Technology Management, University of Pennsylvania
- 1992 – BS - Finance & Marketing, La Salle University

Business Experience

- 08/2024 – Present, Patel Capital Management LLC, Member and CCO
- 07/2018 – 07/2024, Fidelity Personal and Workplace Advisors, Mass Transfer
- 10/2014 – 07/2024, Fidelity Brokerage Services LLC, Investment Representative
- 01/2012 – 09/2014, Bank of America, Financial Advisor
- 08/2011 – 09/2014, Merrill Lynch, Pierce, Fenner & Smith Incorporated, Financial Advisor

Item 3: Disciplinary Information

Shailesh Patel has never been involved in any criminal or civil actions, administrative proceedings, self-regulatory organization (SRO) proceedings, or other hearings or formal adjudications.

Item 4: Other Business Activities

Shailesh Patel is not involved in any outside business activities.

Item 5: Additional Compensation

Shailesh Patel does not receive any economic benefit from any person, company, or organization, in exchange for providing Clients advisory services through PCM.

Item 6: Supervision

Shailesh Patel as Chief Compliance Officer of PCM, supervises the advisory activities of our firm. Shailesh Patel is bound by and will adhere to the firm's policies and procedures and Code of Ethics. Clients may contact Shailesh Patel at the phone number on this brochure supplement.

Item 7: Requirements for State Registered Advisers

Shailesh Patel has NOT been involved in an arbitration, civil proceeding, self-regulatory proceeding, administrative proceeding, or a bankruptcy petition.