

Item 1- Cover Page

Roger Shun-Ho Lee

Kirr, Marbach & Company, LLC

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March 27, 2024

This Brochure Supplement provides information about Roger Shun-Ho Lee, CPA, CFA that supplements the Kirr, Marbach & Company, LLC (“KM”) Brochure dated March 27, 2024. There are no material changes in this Brochure Supplement from the preceding version of the Brochure Supplement (dated March 24, 2023). You should have received a copy of the KM Brochure. If you did not receive a copy of the KM Brochure or if you have any questions about the contents of this Brochure Supplement, please contact Mickey Kim, CFA, Chief Operating/Compliance Officer.

Item 2- Educational Background and Business Experience

Roger Shun-Ho Lee (Born 1986)

B.S. Accounting, Binghamton University, 2008

Certified Public Accountant, New York State since 2010

Chartered Financial Analyst (CFA) since 2012

The CFA Program is administered by the CFA Institute. The following description of the CFA designation is from the CFA Institute’s website @ www.cfainstitute.org. “First introduced in 1963, the Chartered Financial Analyst designation, or CFA charter, has become the most respected and recognized investment credential in the world. To earn a CFA charter, you must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute 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. The CFA Program is organized into three levels, each culminating in a six-hour exam. The CFA Program reflects a broad Candidate Body of Knowledge™ (CBOK) developed and continuously updated by active practitioners to ensure that charterholders possess knowledge grounded in the real world of today’s global investment industry.”

2016-Present	Kirr, Marbach & Company, LLC, Columbus, IN Director of Research (since 2022) Senior Research Analyst (since 2016)
2013-2016	Pacific View Asset Management LLC, affiliate of BTIG, San Francisco, CA Equity Research Analyst
2013	Artisan Partners LP, San Francisco, CA Equity Research Associate
2011-2013	Nuveen Investments Inc., subsidiary of TIAA-CREF, Los Angeles, CA Equity Research Associate

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.

Item 4- Other Business Activities

Mr. Lee is an owner/investor of rental properties in Indianapolis, IN through several limited liability companies.

- River West Property LLC (33%)
- Indy Industrial Investors LLC (33%)
- 1540 S. East Street LLC (33%)
- RAS Property Group LLC (75%)
- River West Investment Group LLC (11.11%)

Mr. Lee is an angel investor in the following limited liability companies.

- Vitalswap Technologies LLC (4%)

Mr. Lee is a member of the board of directors of the following organizations:

- CFA Society of Indianapolis (Chapter of the CFA Institute)
- IMPACT Central Indiana (Subsidiary of the Central Indiana Community Foundation)

Item 5- Additional Compensation

Not applicable.

Item 6 - Supervision

Mark Foster, CFA Chief Investment Officer and Mickey Kim, CFA Chief Operating/Compliance Officer are the primary owners of Kirr, Marbach & Company, LLC and responsible for supervising all supervised persons and monitoring the advice the supervised persons provide to clients. KM's "Investment Team" (Mark Foster, CFA, Roger Lee, CFA, Margaret Kamman, CFP® and Mickey Kim, CFA) meet formally every week and are joined monthly by Matthew Kirr and Zachary Greiner, CFP®. Investment/management meetings are also held on an ad hoc, as needed basis.

Item 7- Requirements for State-Registered Advisers

No information is applicable to this Item.