



This brochure supplement provides information about Karen M. Troiano that supplements the Altman Investment Management LLC brochure. You should have received a copy of that brochure. Please contact Peter J. Altman, President if you did not receive the Altman Investment Management LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Karen M. Troiano is also available on the SEC's website at www.adviserinfo.sec.gov.

ALTMAN INVESTMENT MANAGEMENT, LLC

Form ADV Part 2B – Individual Disclosure Brochure Supplement

March 1, 2024

for

Karen M. Troiano, CFA
Sr. Portfolio Manager

Altman Investment Management LLC
33 Witherspoon Street, 2nd Floor, Princeton NJ 08542
Telephone: 609-252-0048
ktroiano@altman-investment.com

President and Chief Investment Officer: Peter J. Altman
Telephone: 609-252-0048
paltman@altman-investment.com

Item 2: Educational Background and Business Experience

Name: Karen M. Troiano

Born: September 2, 1971

Education Background and Professional Designations:

Education:

- Rider University, Lawrenceville NJ: BS and MBA – Class of 1994

Designations:

- **Chartered Financial Analyst (CFA) Charterholder since September 2001**

The following are the minimum standards required by the CFA Institute to obtain and maintain the above designation:

- Pass 3 levels of comprehensive exams covering topics such as ethical and professional standards, economics, financial statement analysis, equity investments, fixed income investments, derivatives, portfolio management, and wealth planning,
- Work experience requirements: direct involvement with the investment decision making process or producing a work product that informs or adds value to that process
- 2-3 professional references providing insight on work experience and professional character
- Annual Professional Learning activities contributing to knowledge as an investment professional and a lifelong learner
- Annual submission of Professional Conduct Statement

Further information about the above designation can be found on cfainstitute.org

- **North American Securities Administrators Association (“NASAA”) Series 63 and Series 65 qualifications.**

The following are the minimum standards required by NASAA to obtain the above qualifications:

Uniform Securities Agent State Law Examination - (Series 63) (NASAA) - 60 multiple choice questions; 1 hour and 15 minutes testing time. The Series 63 is designed to qualify candidates as securities agents. The examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

Uniform Investment Adviser Law Examination - (Series 65) (NASAA) - 130 multiple choice questions; 3 hours testing time. The Series 65 is designed to qualify candidates as investment adviser representatives

Further information about the above designations is available at www.finra.org.

Business Background:

2008 – Present:	<u>Altman Investment Management LLC, Princeton NJ</u> Sr. Portfolio Manager
1994-2005:	<u>Merrill Lynch Asset Management, Inc. Princeton NJ</u>
1998-2005	Vice President and Portfolio Manager
1997-1998	Sr. Business Analyst
1994-1997	Sr. Mutual Fund Specialist and Money Market Specialist

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Karen M. Troiano is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Other than salary and bonuses, Karen M. Troiano does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Altman Investment Management LLC.

Item 6: Supervision

As sole owner and representative of Altman Investment Management LLC Peter J. Altman supervises all duties and activities of Karen M. Troiano relating to AIM and its clients. Peter J. Altman's contact information is on the cover page of this disclosure document.

Item 7: Requirements for State Registered Advisers

AIM has not completed this section as AIM is not a state registered adviser.