



*This brochure supplement provides information about Peter J. Altman 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 Peter J. Altman is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **ALTMAN INVESTMENT MANAGEMENT, LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure Supplement**

March 1st, 2024

*for*

**Peter J. Altman**  
**Portfolio Manager**

Altman Investment Management LLC  
33 Witherspoon Street, 2<sup>nd</sup> Floor, Princeton NJ 08542  
Telephone: 609-252-0048  
[paltman@altman-investment.com](mailto:paltman@altman-investment.com)

## **Item 2: Educational Background and Business Experience**

**Name:** Peter J. Altman

**Born:** September 23, 1957

### **Education Background and Professional Designations:**

#### **Education:**

- Hobart College, Geneva, New York: BA History/Political Science – Class of 1979
- New York Institute of Finance New York, NY: Accounting and Security Analysis: Class of 1980

#### **Designations:**

- 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](http://www.finra.org).

#### **Business Background:**

2001 – Present: Altman Investment Management LLC, Princeton NJ  
President and Chief Investment Officer

1987-2001: Merrill Lynch Asset Management, Inc. Princeton NJ  
1999-2001 First Vice President  
1996-1998 Director  
1987-1996 Vice President

Prior experience: Securities Analyst: Morgan Stanley & Co. Inc, Martin Simpson & Co., Hemerslag, Kempner & Co.

### **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**

Peter J. Altman is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Other than salary and bonuses, Peter J. Altman 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 the Firm. 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.