

Item 1- Cover Page

## Part 2B of Form ADV: Brochure Supplement

Convergence Investment Partners, LLC

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This Brochure Supplement provides information about David Abitz that supplements the Convergence Investment Partners, LLC Brochure. You should have received a copy of that Brochure. Please contact us if you did not receive our Brochure or if you have any questions about the contents of this supplement.

Additional information about David Abitz is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

David Abitz, CFA<sup>®</sup>, Chief Investment Officer  
Born 03/21/1970

### *Post-Secondary Education:*

Master of Business Administration, University of Wisconsin – Madison  
Bachelor of Finance, University of Wisconsin - Oshkosh

### *Recent Business Background:*

Convergence Investment Partners, LLC (fka Mariner Quantitative Solutions, LLC), President  
and Chief Investment Officer/Partner/Director, 12/2008 – Present

### *Professional Designations:*

Chartered Financial Analyst<sup>®</sup>

The **CFA** designation is granted and administered by the CFA Institute. To earn a CFA charter, applicants must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to its Code of Ethics and Standards of Professional Conduct, and complete the CFA Program. The CFA Program consists of three levels of study on topics including ethics, investments, economics, financial reporting, corporate finance, and portfolio management. Applicants must pass a six-hour exam to advance through each level.

Details on the requirements of CFA charter holders are available at  
<http://www.cfainstitute.org/programs/cfaprogram/charterholder/Pages/index.aspx>.

## **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**

No information applicable to this Item.

## **Item 5- Additional Compensation**

No information is applicable to this Item.

### **Item 6 - Supervision**

David Abitz is responsible for investment decisions and performance of a fund or client account. As Chief Investment Officer and Principal of the Firm, Mr. Abitz has supervisory authority over all investment advisory activities of the Firm. He can be reached at (561) 494-8001. Although Mr. Abitz does not have a direct supervisor, he provides investment advice pursuant to Convergence's compliance policies and procedures.