

# RPATA, LLC

A Registered Investment Advisor

## Brochure Supplement Lauren Douglas Carpenter

March 21, 2024

This brochure provides information about Lauren Douglas Carpenter that supplements the Disclosure Brochure of RPATA, LLC (hereinafter "RPATA"), a copy of which you should have received. Please contact RPATA's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Lauren Douglas Carpenter is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2. Educational Background and Business Experience

Born 1983

### Post-Secondary Education

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University of Mississippi | MBA | 2006

University of Mississippi | B.S., Marketing Communications | 2004

### Recent Business Background

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Revolution Partners, LLC | Business Process Manager | April 2018 – Present

RPATA, LLC | Business Process Manager | April 2018 – Present

Cannon Financial Institute | Senior Consultant | October 2014 – March 2018

Independent Contractor | Business Process Consultant | November 2013 – September 2014

Raymond James Financial | Business Process Manager | April 2012 – October 2013

Morgan Keegan & Co., Inc. | Practice Management Group, Coordinator | February 2008– March 2012

## Item 3. Disciplinary Information

RPATA is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Lauren Douglas Carpenter. RPATA has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

RPATA is required to disclose information regarding any investment-related business or occupation in which Lauren Douglas Carpenter is actively engaged.

Lauren Douglas Carpenter serves as Business Process Manager and an Investment Advisor Representative for both Revolution Partners, LLC and RPATA, LLC, per an Administrative Services Agreement in which Revolution Partners, LLC provides administrative and financial services for RPATA, LLC. She allocates her time approximately equally between the two entities.

## Item 5. Additional Compensation

RPATA is required to disclose information regarding any arrangement under which Lauren Douglas Carpenter receives an economic benefit from someone other than a client for providing investment advisory services. RPATA has no information to disclose in relation to this Item.

## Item 6. Supervision

P. Brian Fowler, Chief Executive Officer and Chief Compliance Officer, is generally responsible for supervising Lauren Douglas Carpenter's advisory activities on behalf of RPATA. P. Brian Fowler can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

RPATA supervises its personnel and the investments made in client accounts. RPATA monitors the investments recommended by Lauren Douglas Carpenter to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. RPATA periodically reviews the advisory activities of Lauren Douglas Carpenter, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Lauren Douglas Carpenter.

## Item 7. Requirements for State Registered Advisers

RPATA is required to disclose information regarding Lauren Douglas Carpenter's involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. RPATA has no information to disclose in relation to this Item.