



## **INNOVATION PARTNERS LLC**

### **Fairview Plaza Office Complex**

5950 Fairview Road

Suite 806

Charlotte, NC 28210

(704) 708-5461

[www.innovationpartnersllc.com](http://www.innovationpartnersllc.com)

February 24, 2018

This Brochure provides information about the advisory personnel on whom you may rely for investment advice. Please contact IPLLC if you did not receive our Brochure (ADV Part 2A) or if you have any questions about the contents of this supplement. Additional information about IPLLC or advisory personnel is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

#### **Advisory Personnel**

**Lonnie McLane**

CRD#: 2049875

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

### **Lonnie McLane**

Year of Birth: 1956

#### **Education**

Mr. McLane is an Investment Advisor Representative and a Registered Representative in the states of Michigan. He passed the FINRA Series 6, 63 and 65 exams and is a licensed life, accident and health, variable life and annuities insurance agent in the state of Michigan.

#### **Business Background:**

**Innovation Partners LLC:** 06/2017 – Present – Investment Advisor Representative and Registered Representative

**Mid-Thumb Insurance:** 02/1986 to Present – Owner/Insurance Sales

**Mid Thumb Financial Planning:** 01/1984 to Present– Owner

**Sigma Financial Corporation:** 10/1994 – 05/2017 - Associate

## **Item 3 – Disciplinary Information**

Registered 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**

Lonnie McLane is an investment advisor representative, registered representative and insurance agent with Innovation Partners LLC. Mr. McLane is a licensed life, accident and health, variable contracts and fixed annuity insurance agent in the state of MI. Mr. McLane is the owner and d/b/a as Mid-Thumb Financial Planning LLC. He also d/b/a as Estate and Tax Consultants, a tax preparation and tax consulting firm. Mr. McLane receives consulting fees and commissions from the activities associated with the afore-mentioned companies. Mid-Thumb Financial Planning LLC and Estate and Tax Consultants LLC and Innovation Partners LLC are not affiliated entities.

## **Item 5 – Additional Compensation**

Registered Investment Advisors are required to disclose if the supervised person received an economic benefit from someone who is not a client for providing advisory services. No information is applicable to this Item.

## **Item 6 – Supervision**

The supervised person is monitored by the Chief Compliance Officer (CCO)/Compliance Officers through periodic sampling of archived emails, mandatory compliance meetings and ongoing review of marketing materials. The Compliance Officers are Tom Vorenberg, Donald Lee and Lei (Ellen) Jiao.

## **Item 7 – Requirement for State Registered Advisors**

Registered Investment Advisors are required to disclose whether the supervised person has been involved in any events related or otherwise being found liable to arbitration claims alleging damages in excess of \$2,500.00, civil or self-regulatory organization or administrative proceedings involving: investment or investment related activity, fraud, false statement (s) or omissions, theft, embezzlement, wrongful taking of property, bribery, forgery, counterfeiting, extortion, dishonest, unfair and unethical practices. No information is applicable to this Item.

Registered Investment Advisors are required to disclose whether the supervised person has been the subject of a bankruptcy petition. No information is applicable to this item.