

## ADV PART 2B – BROCHURE SUPPLEMENT

Geoffrey J. Greenleaf, CFA

Member – Chairman

Private Harbour Investment Management & Counsel, LLC

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Dated March 1, 2018

This brochure supplement provides information about Geoffrey J. Greenleaf, CFA that supplements the Private Harbour Investment Management & Counsel's brochure. A copy of that brochure precedes this supplement. Please contact James Blue, CEO and Chief Compliance Officer, if you did not receive Private Harbour's brochure or if you have any questions about the contents of this supplement.

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

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

Geofrey J. Greenleaf, CFA was born in 1944. Mr. Greenleaf graduated from Dartmouth College, Hanover, New Hampshire in 1966 with an A.B. Economics/Engineering degree and earned his MBA/Finance with honors from Stanford University, Palo Alto, California in 1968. He was Chief Executive Officer and Managing Member of Private Harbour Investment Management & Counsel since he co-founded the firm in 2008. Since 2014 Mr. Greenleaf has been Member – Chairman.

Prior to co-founding Private Harbour, Mr. Greenleaf was a President and a Director of Greenleaf Capital Management, a firm he founded in 1976.

Mr. Greenleaf earned the Chartered Financial Analyst (CFA) designation in 1979 and holds the Chartered Investment Counselor (CIC) designation. According to the CFA Institute, to be awarded the CFA charter one must have four years of qualified investment experience, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The disciplines of study include accounting, economics, ethics, equity analysis, fixed income analysis, portfolio management and statistics. The CFA Institute describes the CFA designation as follows: “First introduced in 1963, the Chartered Financial Analyst designation, or CFA charter, has become the most respected and recognized investment credential in the world.” The CIC designation is awarded to qualified investment advisors by the Investment Adviser Association, of which Private Harbour is a member. In addition to successful completion of the CFA program, the CIC designation requires candidates to demonstrate significant experience in performing investment counseling and portfolio management responsibilities. At the time the charter is awarded, candidates must be employed by an IAA member firm, must provide work and character references must endorse the IAA’s Standards of Practice, and must provide professional ethical information.

## **Item 3: Disciplinary Information**

There are no disciplinary activities past or present to disclose.

## **Item 4: Other Business Activities**

None

## **Item 5: Additional Compensation**

Geoffrey J. Greenleaf does not receive any additional compensation beyond his salary and bonus except for Trustee Fees from a trust benefitting a friend who is a former neighbor.

**Item 6: Supervision**

As Chief Compliance Officer, Geoffrey Greenleaf, monitors the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics of Private Harbour's supervised persons on a continuous basis using various methods, including periodic inspection and review of employee securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. He can be reached at 216-292-5700.