

# Columbus Macro, LLC

## Form ADV Part 2B Supplement

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*Additional information about Columbus Macro, LLC is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Columbus Macro, LLC's CRD number is: 286374.*

Management Team Members: Craig E. Columbus, Lon J. Gerber

for: Craig E. Columbus

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Date: 03/20/2020

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Craig Columbus was born in 1967. Mr. Columbus graduated from Loyola University-Chicago with a Bachelor of Arts degree in Economics in 1990. He also graduated from Indiana University-Bloomington with a Doctor of Jurisprudence in Law in 1992 (admitted Pennsylvania bar), Pennsylvania State University with a Master of Business Administration in 1994, and Arizona State University with a Master of Arts in Emergency Management and Homeland Security in 2016

### *Business Experience*

2017–Present	Columbus Macro, Chief Executive Officer, co-CIO
2015–2017	Tower Square Investment Management, President and CEO
2006–2015	First Allied Asset Management, President
2004–2008	Greenbook Investment Management, Chief Market Strategist

Columbus Macro, LLC is guided by Craig Columbus, who oversees investment decision-making and sets the strategic direction of our firm. Mr. Columbus is a popular conference and event speaker focusing on macroeconomic trends and public policy. He also frequently shares his insights across a variety of prominent media platforms.

Mr. Columbus has held a variety of CEO roles over the last twenty years, leading Cetera's Tower Square Investment Management, First Allied Asset Management, and the financial algorithm provider Scorelab, Inc. He became a recognizable figure on financial television during his tenure as market strategist for financial information providers Primark Corp. and Thomson Financial. Mr. Columbus previously served as both a professor and department chair at Grove City College (Grove City, Pa.) and has also been a scholar at the Center for Vision and Values, a policy think tank committed to free-market principles.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

No outside business activities to disclose.

## ITEM 5 – ADDITIONAL COMPENSATION

Does not receive any additional economic benefit for providing advisory services.

## ITEM 6 – SUPERVISION

As CEO, Craig Columbus is responsible for supervising all business activity and ensuring all activities are in accordance with the firm's policies and procedures. The CCO is responsible for supervising the reporting responsibilities of the CEO. Any concerns regarding the CEO's activities may be directed to the CCO.

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Management Team Members: Craig E. Columbus, Lon J. Gerber

for: Lon J. Gerber

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Lon Gerber was born in 1967. Mr. Gerber attended Pennsylvania State University and graduated with a Master of Business Administration degree in 1994. Previously, Mr. Gerber attended Binghamton University and graduated with a Bachelor of Science degree in Management in 1989.

### *Business Experience*

2017–Present	Columbus Macro, President and Chief Compliance Officer
2015–2017	Tower Square Investment Management, Chief Operating Officer
2007–2015	First Allied Asset Management, Chief Operating Officer
2007–2008	Greenbook Investment Management, Co-Portfolio Manager

As the president of Columbus Macro, Lon Gerber oversees the firm's business, finance, operations, and compliance activities. Mr. Gerber previously served as the COO for Tower Square Investment Management and First Allied Asset Management. He also led analytical product development for Thomson Financial's wealth management division and served as a financial analyst at Citibank, where he was responsible for revenue forecasting for its U.S. consumer and commercial lending products.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

No outside business activities to disclose.

## ITEM 5 – ADDITIONAL COMPENSATION

Does not receive any additional economic benefit for providing advisory services.

## ITEM 6 – SUPERVISION

Supervisor	Supervisor, Phone
CEO, Craig Columbus	724-761-2513

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**Management Team Members: Craig E. Columbus, Lon J. Gerber**

**for: Scott T. Dooley, CFA**

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Scott Dooley was born in 1977. Mr. Dooley graduated from Grove City College with a Bachelor of Science degree in Finance in 2000. He also graduated from the University of Chicago with a Master of Business Administration degree in 2009.

### *Business Experience*

2019–Present	Columbus Macro, Managing Director, Portfolio Manager
2018–Present	Rayliant Asset Management, Chief Compliance Officer and Managing Director
2018–Present	Rayliant Global Advisors, Head of OCIO Service
2008-2018	Fusion Investment Group, LLC, Chief Executive Officer, Chief Compliance Officer, Chief investment Officer

Mr. Dooley serves as a Managing Director, Portfolio Manager. Scott brings extensive investment management experience specializing in the institutional, government entity, and defined benefit spaces.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

Scott Dooley is also a Managing Director for Rayliant Global Advisors and serves as the Chief Investment Officer and Chief Compliance Officer of Rayliant Asset Management, US. Mr. Dooley is the Managing Member of Fusion Management Group, LLC, a holding company which owns an equity stake in ETF Global, LLC

## ITEM 5 – ADDITIONAL COMPENSATION

Does not receive any additional economic benefit for providing advisory services.

## ITEM 6 – SUPERVISION

Supervisor	Supervisor, Phone
CEO, Craig Columbus	724-761-2513

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Management Team Members: Craig E. Columbus, Lon J. Gerber

for: Brian D. Wright

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Brian Wright was born in 1975. Mr. Wright attended Boston University and graduated with a Bachelor of Arts degree in Economics in 1997.

### *Professional Designations*

Mr. Wright currently holds the Chartered Financial Analyst® (CFA) designation. The CFA designation is offered by the CFA Institute (formerly the Association for Investment Management and Research [AIMR]). To obtain the CFA charter, candidates must successfully complete three difficult examinations and gain at least four (4) years of qualifying work experience, among other requirements. In passing these examinations, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

### *Business Experience*

2017–Present	Columbus Macro, co-Chief Investment Officer
2015–2017	Tower Square Investment Management, Senior Portfolio Manager
2006–2015	First Allied Asset Management, Senior Portfolio Manager
2005–2008	Greenbook Investment Management, Head Trader/Co-Portfolio Manager

Brian Wright serves as our co-CIO, guiding portfolio construction, capital market forecasting, and security selection. He brings specialized expertise in building proprietary processes to identify mispricings relative to fundamental fair value. Mr. Wright previously served as a Senior Portfolio Manager at Tower Square Investment Management and First Allied Asset Management, overseeing several long-tenured strategies. He honed his fundamental skills in both the hedge fund and institutional research spaces, serving as an analyst conducting earnings-quality and forensic accounting investigations.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

No outside business activities to disclose.

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## ITEM 5 – ADDITIONAL COMPENSATION

Does not receive any additional economic benefit for providing advisory services.

## ITEM 6 – SUPERVISION

<b>Supervisor</b>	<b>Supervisor, Phone</b>
CEO, Craig Columbus	724-761-2513



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Management Team Members: Craig E. Columbus, Lon J. Gerber

for: Raymond C. Micaletti

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Raymond C. Micaletti was born in 1972. Mr. Micaletti graduated from the University of Notre Dame with a Bachelor of Science degree in Civil Engineering in 1994. He also graduated from Princeton University with a Ph.D, M.A degree in Engineering Mechanics in 1999.

### *Business Experience*

2017–Present	Columbus Macro, co-Chief Investment Officer
2014–2017	AUA Capital Management, Director of Research/Senior Portfolio Manager
2013–2014	Telluride Allied Asset Management, Portfolio Manager
2011–2013	Macrosignal LLC, Co-founder/Partner/CEO
2008–2009	Barclay’s Capital, Quantitative Equity Strategist
2004–2008	Fortress Investment Group, Portfolio Manager

Raymond C. Micaletti serves as our co-CIO, leading our financial engineering, risk management, and global tactical asset allocation efforts. Dr. Micaletti has extensive experience in the financial industry working as a global macro portfolio manager, investment strategist, and risk analyst. Ray brings specialized expertise in the development of systematic strategies and quantitative risk management.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

No outside business activities to disclose.

## ITEM 5 – ADDITIONAL COMPENSATION

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Supervisor	Supervisor, Phone
CEO, Craig Columbus	724-761-2513

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Management Team Members: Craig E. Columbus, Lon J. Gerber

for: R. Scott Umstead

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Scott Umstead was born in 1953. Mr. Umstead graduated from Southern Methodist University with a Bachelor of Arts degree in English in 1974.

### *Business Experience*

2017–Present	Columbus Macro, Chief Marketing Officer and Head of Business Development
2016-2017	Ironview Capital Management , Partner
2015-2016	Solenture Inc., Director
2010-2014	Fusion Investment Group, Pres. & CEO
2008-2010	ProEquities, EVP-CMO
2005-2008	Sweetwater Asset Management, LLC, Pres. & CEO
2000-2003	Wachovia Securities/Prudential Securities Inc., EVP-Eastern Div.
1975-2000	Merrill Lynch, Pierce, Fenner & Smith, FVP-Dist. Dir.

Scott Umstead serves as our Chief Marketing Officer and Head of Business Development. Scott brings a wealth of senior executive experience gained at both large and small financial institutions.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

Scott Umstead provides consulting services to Endeavor Sound, LLC. Additionally, while he is no longer affiliated with Ironview Capital Management, he is eligible for deferred compensation related to prior consulting.

## ITEM 5 – ADDITIONAL COMPENSATION

Does not receive any additional economic benefit for providing advisory services.

## ITEM 6 – SUPERVISION

Supervisor	Supervisor, Phone
CEO, Craig Columbus	724-761-2513

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Management Team Members: Craig E. Columbus, Lon J. Gerber

for: Geoffrey J. Deasey

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### *Educational Background*

Geoffrey Deasey was born in 1957. Mr. Deasey graduated from the University of Pennsylvania with a Bachelor of Arts degree in Political Science and Sociology in 1980. He also graduated from Widener University with a Doctor of Jurisprudence in Law in 1983

### *Business Experience*

2017-Present	Columbus Macro, Managing Director, Mid-Atlantic Region
2016-2017	Ironview Capital Management, Investment Advisor Representative
2014-2017	Dillon Capital Management, Investment Advisor Representative
2015-2016	AUA Capital Management, Investment Advisor Representative
2014-2015	Chester County Asset Management, Inc., Investment Advisor Representative
2013-2014	Freelance Consultant
2011-2013	West Chester Capital Advisors, Inc., VP, Wealth Management Advisor
2009-2011	Legg Mason Investor Services, LLC., Registered Rep
2008-2011	Global Currents Investment Management, LLC., Director
2007-2008	Glenmede Investment Management, LP, Sales Manager

Geoffrey Deasey serves as our Managing Director, Mid-Atlantic Region. Geoff brings extensive institutional business development experience gained at a number of prominent financial institutions.

## ITEM 3 – DISCIPLINARY INFORMATION

No disciplinary events to disclose.

## ITEM 4 – OUTSIDE BUSINESS ACTIVITIES

While he is no longer affiliated with the firm, Geoffrey Deasey receives compensation from Ironview Capital Management for certain legacy accounts opened prior to his joining Columbus Macro.

## ITEM 5 – ADDITIONAL COMPENSATION

Does not receive any additional economic benefit for providing advisory services.

## ITEM 6 – SUPERVISION

Supervisor	Supervisor, Phone
Scott Umstead	724-761-2373