



*Brochure Supplement*

**Frank Chris Greene**

**Private Wealth Partners, LLC**

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This brochure supplement provides information about F. Chris Greene that supplements the Private Wealth Partners brochure. You should have received a copy of that brochure. Please contact a member of the client services team at [clientservices@pwpart.com](mailto:clientservices@pwpart.com) if you did not receive Private Wealth Partners' brochure or if you have any questions about the contents of this supplement

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

**Full Legal Name:** F. Chris Greene

**Born:** 1970

### **Education:**

BA Economics from Claremont McKenna College 1992

### **Professional Designation:**

Chartered Financial Analyst (CFA®)<sup>1</sup>, CFA Institute 2003

### **Business Experience:**

Asset Management - BCI Capital Management	2003-2018
Asset Management - Wells Capital Management	1997-2003
Investment Banking - Hambrecht & Quist	1993-1997

## **Item 3 Disciplinary Information:**

Mr. Greene has no reportable disciplinary history.

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

Mr. Greene has a passive stake in a legacy information services business. He does not derive a substantial compensation or involves a substantial amount of his time to this business.

## **Item 5 Additional Compensation:**

Mr. Greene does not receive any economic benefit directly from any non-advisory client for the provision of advisory services.

## **Item 6 Supervision:**

Private Wealth Partners' Chief Compliance Officer ("CCO") provides supervision of client accounts managed by Chris Greene that includes review of account documentation, review of client correspondence and quarterly performance data, monitoring of security selection and allocation to clients and analysis of brokers used for trade execution. On a periodic basis the CCO meets with Mr. Chris Greene to discuss investment or administrative matters relating to specific client portfolios.

<sup>1</sup> *Chartered Financial Analyst (CFA®): The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investments topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable profession experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFRA Institute Code of Ethics and Standards of Profession Conduct. To learn more about CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).*