

GOSTKOWSKI INVESTMENT ADVISORS, LLC
Brochure Supplement ADV Part 2B

Elizabeth Ann Gostkowski
Gostkowski Investment Advisors, LLC
1522 Thrush Ridge
San Antonio, Texas 78248
210-232-2815

GostkowskiInvestmentAdvisors@gmail.com

November 15, 2023

GOSTKOWSKI INVESTMENT ADVISORS, LLC

Brochure Supplement ADV Part 2B

Elizabeth Ann “Lisa” Menchaca

- Baylor University 1999
- University of Texas at San Antonio 2003

Elizabeth Ann “Lisa” Menchaca Gostkowski, born August 21, 1976, in San Antonio, Texas, began her investment career in 2003 at Frost National Bank. Lisa held various financial and investment related positions while employed at Frost. In 2011, Lisa was recruited by South Texas Money Management, “STMM”. When Lisa left employment at “STMM” now CAPTRUST Advisors in 2023 she was a Senior Vice President, Investment Advisor. During Lisa’s career she recognized a lack of client focused investing and planning. Because of this industry need, Lisa formed Gostkowski Investment Advisors, LLC.

Elizabeth Ann “Lisa” Menchaca Gostkowski has no disciplinary information to report.

Elizabeth Ann “Lisa” Menchaca Gostkowski is the current treasurer of Alpha Home, a non-profit organization in San Antonio, Texas. She receives no compensation for this role.

Elizabeth Ann “Lisa” Menchaca Gostkowski is the founder and CCO for Gostkowski Investment Advisors, LLC. She can be reached at GostkowskiInvestmentAdvisors@gmail.com 210-232-2815. As the current CCO for Gostkowski Investment Advisors, LLC, Lisa, maintains all firm documents & communications created and distributed to clients. Documents being any letters, contracts, or advertisement for solicitation. Communication being any written or electronic correspondence generated by the firm. The firm maintains a centralized storage of documentation that is then scanned and stored electronically via a CRM. All investment advice for each specific client is maintained in the CRM and documented as well. The appropriateness of investment advice for each client is reviewed against client provided financial information. Additionally, firm, and non-firm created financial planning is maintained and utilized to determine investment suitability.