

BROCHURE SUPPLEMENT (FORM ADV Part 2B)

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ANDREAS ECKNER, PH.D.
SCOTT GILLESPIE, CFA
JAMES B. GRIBBELL, CFA
MATTHEW S. GULESERIAN, CFA
GUILLAUME HOREL, PH.D.
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This Brochure Supplement provides information about LMCG Investments, LLC's Supervised Persons, and supplements the LMCG Investments, LLC Brochure. You should have received a copy of that Brochure. Please contact the Compliance Department of LMCG Investments, LLC at compliance@lmcg.com if you did not receive LMCG Investments, LLC's Brochure or if you have any questions about the contents of this supplement.

BROCHURE SUPPLEMENT

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Alexandria Birrell, CFA

Year of Birth: 1991

Educational Background and Business Experience

Education: B.S., Finance, Bentley University

Professional Designations: CFA (Chartered Financial Analyst)

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential awarded by the CFA Institute. To obtain a CFA designation, a candidate must meet one of the following requirements: undergraduate degree and four years of professional experience involving investment decision-making, or four years qualified work experience and successfully complete three course examinations. The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession.

Business Background: LMCg Investments, LLC 04/2026 – present
Portfolio Manager, Private Client Group

LMCG Investments, LLC 02/2020 – 03/2026
Investment Analyst, Equity

Disciplinary Information

Registered investment 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.

Other Business Activities

None

Additional Compensation

Bonuses are formula driven and are generally based on assets managed and revenues.

Supervision

Alexandria Birrell serves as a Portfolio Manager at LMCg Investments, LLC (LMCG), and reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

The advice Ms. Birrell provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.

BROCHURE SUPPLEMENT

ANDREAS ECKNER, PH.D.

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Andreas Eckner, Ph.D.

Year of Birth: 1979

Educational Background and Business Experience

Education: Stanford University, Ph.D. Statistics
Stanford University, M.S. Financial Mathematics

Business Background: LMCG Investments, LLC 05/2015 – present
Portfolio Manager
Relative Value Credit Strategy

Disciplinary Information

Registered investment 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.

Other Business Activities

None

Additional Compensation

Bonuses are formula driven and are generally based on assets managed and revenues.

Supervision

Andreas Eckner serves as a Portfolio Manager – Relative Value Credit Strategy at LMCG Investments, LLC (LMCG), and reports to the Chief Investment Officer of Serenitas, David L. Weeks who can be reached at (646) 652-7297.

The advice Mr. Eckner provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.



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Scott Gillespie, CFA

Year of Birth: 1988

Educational Background and Business Experience

Education: Wake Forest University BA

Professional Designations: CFA (Chartered Financial Analyst)

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Business Background:	LMCG Investments, LLC	10/2023 – present
	Portfolio Manager, Private Client Group	
	Artemis Financial Advisors	03/2020 – 10/2023
	Portfolio Manager	

Disciplinary Information

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Other Business Activities

None

Additional Compensation

Bonuses are formula driven and are generally based on assets managed and revenues.

Supervision

Scott Gillespie serves as a Portfolio Manager at LMCG Investments, LLC (LMCG), and reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

The advice Mr. Gillespie provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.



BROCHURE SUPPLEMENT

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James B. Gribbell, CFA

Year of Birth: 1967

Educational Background and Business Experience

Education: University of Pennsylvania, The Wharton School BS

Professional Designations: CFA (Chartered Financial Analyst)

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Business Background: LMC G Investments, LLC 07/2009 – present
Portfolio Manager, Private Client Group

Disciplinary Information

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Other Business Activities

None

Additional Compensation

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Supervision

James Gribbell serves as a Portfolio Manager at LMC G Investments, LLC (LMCG), and reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

The advice Mr. Gribbell provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.



BROCHURE SUPPLEMENT

MATTHEW S. GULESERIAN, CFA

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Matthew S. Guleserian, CFA

Year of Birth: 1967

Educational Background and Business Experience

Education: Babson College BS
Babson Graduate School MBA

Professional Designations: CFA (Chartered Financial Analyst)

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Business Background: LMC G Investments, LLC 07/2009 – present
Portfolio Manager, Fixed Income

Disciplinary Information

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Other Business Activities

None

Additional Compensation

Bonuses are formula driven and are generally based on assets managed and revenues.

Supervision

Matthew Guleserian serves as a Portfolio Manager at LMC G Investments, LLC (LMC G), and reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

The advice Mr. Guleserian provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.

BROCHURE SUPPLEMENT

GUILLAUME HOREL, PH.D.

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Guillaume Horel, Ph.D.

Year of Birth: 1982

Educational Background and Business Experience

Education: Pantheon-Sorbonne University - Economics
Stanford University – M.S. Financial Mathematics/Ph.D. Statistics

Business Background: LMCG Investments, LLC 05/2015 – present
Portfolio Manager
Relative Value Credit Strategy

Disciplinary Information

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Other Business Activities

None

Additional Compensation

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Supervision

Guillaume Horel serves as a Portfolio Manager – Relative Value Credit Strategy at LMCG Investments, LLC (LMCG), and reports to the Chief Investment Officer of Serenitas, David L. Weeks who can be reached at (646) 652-7297.

The advice Mr. Horel provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.

BROCHURE SUPPLEMENT

NAN-MARIE JAEGER, CFA

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Nan-Marie Jaeger, CFA

Year of Birth: 1954

Educational Background and Business Experience

Education: St. Joseph's College BA
Boston College MBA

Professional Designations: CFA (Chartered Financial Analyst)

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Business Background: LMCG Investments, LLC 07/2009 – present
Portfolio Manager, Private Client Group

Disciplinary Information

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Other Business Activities

None

Additional Compensation

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Supervision

Nan-Marie Jaeger serves as a Portfolio Manager at LMCG Investments, LLC (LMCG), and reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

The advice Ms. Jaeger provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.



BROCHURE SUPPLEMENT

AJIT KUMAR, CFA

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Ajit Kumar, CFA

Year of Birth: 1973

Educational Background and Business Experience

Education: Stanford University, M.S. Financial Mathematics
McGill University, MBA

Professional Designations: CFA (Chartered Financial Analyst)

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Business Background: LMC G Investments, LLC 05/2015 – present
Portfolio Manager
Relative Value Credit Strategy

Disciplinary Information

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Other Business Activities

None

Additional Compensation

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Supervision

Ajit Kumar serves as a Portfolio Manager – Relative Value Credit Strategy at LMC G Investments, LLC (LMCG), and reports to the Chief Investment Officer of Serenitas, David L. Weeks who can be reached at (646) 652-7297.

The advice Mr. Kumar provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.

BROCHURE SUPPLEMENT

CHRISTOPHER J. SABO, CFA

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Christopher J. Sabo, CFA

Year of Birth: 1985

Educational Background and Business Experience

Education: Babson College BS

Professional Designations: CFA (Chartered Financial Analyst)

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Business Background: LMC G Investments, LLC 02/2016 – present
Director of Risk and Investment Strategy

Disciplinary Information

Registered investment 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.

Other Business Activities

None

Additional Compensation

Bonuses are formula driven and are generally based on assets managed and revenues.

Supervision

Christopher Sabo serves as Director of Risk and Investment Strategy at LMC G Investments, LLC (LMC G), and monitors LMC G's portfolio management teams and investment strategies. He reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

Mr. Sabo's activities are monitored by the Investment Review Committee and the Firm's Chief Executive Officer Kenneth L. Swan.



BROCHURE SUPPLEMENT

EDWIN TSUI, CFA

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Edwin Tsui, CFA

Year of Birth: 1980

Educational Background and Business Experience

Education: University of Oxford, Master of Physics
Courant Institute of NYU, M.S. Mathematics in Finance

Professional Designations: CFA (Chartered Financial Analyst)

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential awarded by the CFA Institute. To obtain a CFA designation, a candidate must meet one of the following requirements: undergraduate degree and four years of professional experience involving investment decision-making, or four years qualified work experience and successfully complete three course examinations. The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession.

Business Background: LMC G Investments, LLC 05/2015 – present
Portfolio Manager
Relative Value Credit Strategy

Disciplinary Information

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Other Business Activities

None

Additional Compensation

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Supervision

Edwin Tsui serves as a Portfolio Manager – Relative Value Credit Strategy at LMC G Investments, LLC (LMCG), and reports to the Chief Investment Officer of Serenitas, David L. Weeks who can be reached at (646) 652-7297.

The advice Mr. Tsui provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.

BROCHURE SUPPLEMENT

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David L. Weeks

Year of Birth: 1959

Educational Background and Business Experience

Education: Lehigh University - Bachelor of Science, Finance

Business Background: LMC G Investments, LLC 05/2015 – present
Board Member, Managing Partner, CIO Serenitas
Relative Value Credit Strategy

Disciplinary Information

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Other Business Activities

None

Additional Compensation

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Supervision

David Weeks serves as Managing Director -- Relative Value Credit Strategy at LMC G Investments, LLC (LMC G), and reports to the Firm's Chief Executive Officer Kenneth L. Swan, who can be reached at (617) 380-5600.

The advice Mr. Weeks provides to clients is monitored by the Investment Review Committee and the Director of Risk and Investment Strategy.