

*This brochure supplement provides information about Michael Curtis that supplements the Cornerstone Investment Services, LLC brochure. You should have received a copy of that brochure. Please contact Michael Curtis, VP Managed Accounts if you did not receive Cornerstone Investment Services, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Michael Curtis is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Cornerstone Investment Services, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*

**Michael C. Curtis**  
Investment Adviser Representative  
Personal CRD Number: 1452785

Cornerstone Investment Services, LLC  
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Providence, Rhode Island, 02906  
(401) 453-5550  
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UPDATED: 03/04/2024

## Item 2: Educational Background and Business Experience

**Name:** Michael C. Curtis

**Born:** 1961

### Education Background and Professional Designations:

#### Education:

BA History, University of Rhode Island - 1985

#### Business Background:

|                |   |
|----------------|---|
| 2009 - Present | VP Managed Accounts<br>Cornerstone Investment Services, LLC |
| 2008 - 05/2019 | IAR/Registered Representative<br>Cantella & Co., Inc.       |
| 1997 - 2011    | Vice President<br>Brenva Inc.                               |

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Michael Curtis is not engaged in any investment-related business or occupation (other than this advisory firm).

## Item 5: Additional Compensation

Michael Curtis receives compensation from the sale of insurance products. Mr. Curtis does not receive any cash or non-cash compensation for providing advisory services to non-clients of

Cornerstone Investment Services, LLC. Mr. Curtis also does not receive any performance-based fees.

### Item 6: Supervision

As a representative of Cornerstone Investment Services, LLC, Michael Curtis works closely with John Riley who supervises all duties and activities of this firm. John Riley's contact information is: (401) 453-5550; johnr@cornerstoneri.com.

### Item 7: Requirements For State Registered Advisers

A. Michael Curtis has **NOT** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
  
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Michael Curtis has **NOT** been the subject of a bankruptcy petition at any time.