

This brochure supplement provides information about Joseph Thomas Koster that supplements the Sorfis Investments, LLC brochure. You should have received a copy of that brochure. Please contact Joseph Thomas Koster if you did not receive Sorfis Investments, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Joseph Thomas Koster is also available on the SEC's website at www.adviserinfo.sec.gov.

Sorfis Investments, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Joseph Thomas Koster

Personal CRD Number: 4866651

Investment Adviser Representative

Sorfis Investments, LLC
831 South Street
Chardon, OH 44024
(440) 696-0130
joe@sorfis.com

UPDATED: 03/06/2024

Item 2: Educational Background and Business Experience

Name: Joseph Thomas Koster **Born:** 1983

Educational Background and Professional Designations:

Education:

Bachelor of Science in Business Administration with a concentration in Finance,
Coastal Carolina University - 2005

Business Background:

01/2019 - Present	Managing Member & CCO Sorfis Investments, LLC
04/2013 - 12/2018	Managing Member Boyles Asset Management, LLC
06/2005 - 04/2013	Analyst / Co-Portfolio Manager Chanticleer Holdings, 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

Joseph Koster is a Senior Advisor with Avenel Financial Group. His responsibilities include doing research and analysis for the company. [Avenel Financial Group is not an investment adviser.]

Joseph Koster is also the editor of Value Investing World Newsletter, a newsletter focused on providing reading and other content recommendations to subscribers. There is a free version, as well as a monthly or annual subscription option for those subscribers that want to receive the newsletter more frequently.

Item 5: Additional Compensation

Joseph Thomas Koster does not receive any economic benefit from any person, company, or organization, other than Sorfis Investments, LLC in exchange for providing clients advisory services through Sorfis Investments, LLC.

Item 6: Supervision

As the Chief Compliance Officer of Sorfis Investments, LLC, Joseph Thomas Koster supervises all activities of the firm. Joseph Thomas Koster's contact information is on the cover page of this disclosure document. Joseph Thomas Koster adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

- A. Joseph Thomas Koster 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. Joseph Thomas Koster has NOT been the subject of a bankruptcy.