



## Item 1 - Cover Page

Brochure Supplement

Earl G. Winebrenner, III

Winebrenner Capital Management, LLC

10602 Timberwood Circle, Suite 13

Louisville, KY 40223-5367

(502) 671-0015

April 2022

**This Brochure Supplement provides information about Earl G. Winebrenner, III that supplements the Winebrenner Capital Management, LLC (“WCM”) Brochure (“Brochure”). You should have received a copy of that Brochure. Please contact Krista C. Thompson, Chief Compliance Officer at (502) 671-0015 or via email at [krista@wcmria.com](mailto:krista@wcmria.com) if you did not receive WCM’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Earl G. Winebrenner, III is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 - Educational Background and Business Experience

**Earl G. Winebrenner, III (CRD #1866261)**

Year of Birth: 1964

### EDUCATION:

Bachelor of Science (BS) in Business Administration with a major in Finance at the University of Louisville in Louisville, KY (1988)

## EMPLOYMENT:

Sole Member/Managing Member - Winebrenner Capital Management, LLC (07/2010 to Present)

Managing Member - EAEBA, LLC (05/2021 to Present)

Managing Member - Bourbon West Main LLC (05/2019 to Present)

Managing Member - NuLu East Main LLC (05/2019 to Present)

Managing Member - Plainview Property Investors LLC (07/2018 to Present)

Managing Member - Preston Oaks Apartments, LLC (07/2016 to 12/2020)

Managing Member - Jefferson Self Storage, LLC (04/2015 to Present)

Managing Member - Timberwood Properties LLC (04/2014 to Present)

Managing Member - Autumn Run, LLC (06/2013 to 12/2020)

Managing Member - Winebrenner Property Management, LLC (06/2013 to Present)

Managing Member - Boxford Properties LLC (05/2012 to 12/2016)

Principal/President - Winebrenner Holding Corporation (06/2001 to 03/2018)

Owner - Winebrenner Capital Partners, LLC (09/1999 to 03/2018)

President - Winebrenner Capital Partners, LLC (09/1999 to 12/2010)

## PROFESSIONAL DESIGNATIONS:

NONE

Earl G. Winebrenner, III currently holds the Series 65 (NASAA-Investment Advisors Law Exam) license.

## **Item 3 - Disciplinary Information**

Winebrenner Capital Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Earl G. Winebrenner, III. No events have occurred that are applicable to this Item.

## **Item 4 - Other Business Activities**

As Managing Member of Winebrenner Property Management, LLC, he spends 15 hours a month for this company.

As Managing Member of Timberwood Properties, LLC, he spends 10 hours a month for this company.

As Managing Member of Jefferson Self Storage, LLC, he spends 10 hours a month for this company.

As Managing Member of Plainview Property Investors LLC, he spends 15 hours a month for this company.

As Managing Member of Bourbon West Main LLC, he spends 10 hours a month for this company.

As Managing Member of NuLu East Main LLC, he spends 40 hours a month for this company.

As Managing Member of EAEBA, LLC, he spends 10 hours a month for this company.

Mr. Winebrenner is currently the sole Member and key investment officer of Winebrenner Capital Management, LLC, the General Partner and adviser to: (i) Winebrenner Income Fund, L.P. ("Income Fund"); (ii) Winebrenner Total Return Fund, L.P. ("Total Return Fund"); (iii) Winebrenner Real Estate Fund, L.P. ("Real Estate Fund"); and iv) Winebrenner Opportunity Zone Fund, L.P. ("Opportunity Zone Fund") (collectively, the "Funds"). He each spends 100 hours a month during market hours to these Funds.

Other than what is discussed above, Earl G. Winebrenner, III is not actively engaged in any other investment-related business or occupation or has an application pending to register as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation not discussed above, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

## **Item 5 - Additional Compensation**

Earl G. Winebrenner, III does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales,

client referrals, or new accounts, for providing advisory services, other than his regular salary.

### **Item 6 - Supervision**

Winebrenner Capital Management, LLC has adopted, and periodically updates, a compliance manual that outlines for each employee the rules and regulations to which they must adhere. WCM has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, WCM has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact our Chief Compliance Officer at the telephone number or via email shown on the cover page of this Brochure Supplement.

### **Item 7 - Requirements for State-Registered Advisers**

Winebrenner Capital Management, LLC is an SEC registered investment adviser; therefore, this section is not applicable.



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Wesley L. Crowdis

Winebrenner Capital Management, LLC

10602 Timberwood Circle, Suite 13

Louisville, KY 40223-5367

(502) 671-0015

December 2019

This Brochure Supplement provides information about Wesley L. Crowdis that supplements the Winebrenner Capital Management, LLC (“WCM”) Brochure (“Brochure”). You should have received a copy of that Brochure. Please contact Krista C. Thompson, Chief Compliance Officer at (502) 671-0015 or via email at [krista@wcmria.com](mailto:krista@wcmria.com) if you did not receive WCM’s Brochure or if you have any questions about the contents of this supplement.

Additional information about Wesley L. Crowdis is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 - Educational Background and Business Experience

Wesley L. Crowdis, (CRD #4979155)

Year of Birth: 1984

#### EDUCATION:

Bachelor of Science (B.S.) in Financial Economics at Centre College in Danville, KY (2007)

#### EMPLOYMENT:

Senior Wealth Manager - Winebrenner Capital Management, LLC (09/2010 to Present)

#### PROFESSIONAL DESIGNATIONS:

NONE

Wesley L. Crowdis has taken and passed the Series 7 (General Securities Representative) and 66 (NASAA-Uniform Combined State Law Exam) licenses.

### **Item 3 - Disciplinary Information**

Winebrenner Capital Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Wesley L. Crowdis. No events have occurred that are applicable to this Item.

### **Item 4 - Other Business Activities**

Wesley L. Crowdis is not actively engaged in any other investment-related business or occupation or has an application pending to register as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, Wesley L. Crowdis is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source income or involves a substantial amount of his time.

### **Item 5 - Additional Compensation**

Wesley L. Crowdis does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services, other than his regular salary.

## **Item 6 - Supervision**

Winebrenner Capital Management, LLC has adopted, and periodically updates, a compliance manual that outlines for each employee the rules and regulations to which they must adhere. WCM has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, WCM has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact our Chief Compliance Officer at the telephone number or via email shown on the cover page of this Brochure Supplement.

## **Item 7 - Requirements for State-Registered Advisers**

Winebrenner Capital Management, LLC is an SEC registered investment adviser; therefore, this section is not applicable.



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**James B. Crabtree**

**Winebrenner Capital Management, LLC**

**10602 Timberwood Circle, Suite 13**

**Louisville, KY 40223-5367**

**(502) 671-0015**

**July 2022**

**This Brochure Supplement provides information about James B. Crabtree that supplements the Winebrenner Capital Management, LLC (“WCM”) Brochure (“Brochure”). You should have received a copy of that Brochure. Please contact Krista C. Thompson, Chief Compliance Officer at (502) 671-0015 or via email at [krista@wcmria.com](mailto:krista@wcmria.com) if you did not receive WCM’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about James B. Crabtree is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**



## Item 2 - Educational Background and Business Experience

**James B. Crabtree (CRD #6920880)**

Year of Birth: 1991

### EDUCATION:

Bachelor of Arts (BA) in Psychology and Spanish at the Western Kentucky University in Bowling Green, KY (2014)

Post Bachelor in Financial Planning at Spalding University in Louisville, KY (2022)

### EMPLOYMENT:

Paraplanner - Winebrenner Capital Management LLC (07/2022 to Present)

Self Employed Insurance Sales - American Memorial Life Insurance Company (10/2021 to 7/2022)

Self Employed Insurance Sales - Orca Life (06/2021 to 07/2022)

Registered Associate - Morgan Stanley (02/2021 to 06/2021)

Registered Representative - Ameriprise Financial Services, Inc. (05/2019 to 01/2021)

Self Employed Insurance Sales - Orca Life (12/2018 to 05/2019)

Financial Advisor - Edward Jones (03/2018 to 12/2018)

Self Employed Insurance Sales - Columbian Life Insurance Company (03/2018 to 07/2018)

Self Employed Insurance Sales - Gerber Life Insurance Company (09/2016 to 11/2017)

Self Employed Insurance Sales - Liberty Banker's Life Insurance Company (09/2016 to 11/2017)

Self Employed Insurance Sales - Reserve National Insurance Company (03/2015 to 04/2016)

Self Employed Insurance Sales - Orca Life (06/2010 to 03/2018)

### PROFESSIONAL DESIGNATIONS:

**None**

James B. Crabtree passed the Series 7 (General Securities Representative Examination) and Series 66 (Uniform Combined State Law Exam) licenses. He also received credit for the SIE (Securities Industry Essentials Examination) on October 2018.

### **Item 3 - Disciplinary Information**

Winebrenner Capital Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of James B. Crabtree. No events have occurred that are applicable to this item.

### **Item 4 - Other Business Activities**

James B. Crabtree is not actively engaged in any other investment-related business or occupation, or has an application pending to register as a broker-dealer, registered representative of a broker-dealer, futures commission merchant (“FCM”), commodity pool operator (“CPO”), commodity trading advisor (“CTA”), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation not discussed above, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

### **Item 5 - Additional Compensation**

James B. Crabtree does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services.

### **Item 6 - Supervision**

Winebrenner Capital Management, LLC has adopted, and periodically updates, a compliance manual that outlines for each employee the rules and regulations to which they must adhere. WCM has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, WCM has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact our Chief Compliance Officer at the telephone number or via email shown on the cover page of this Brochure Supplement.

## **Item 7 - Requirements for State-Registered Advisers**

Winebrenner Capital Management, LLC is an SEC registered investment adviser; therefore, this section is not applicable.



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**Krista C. Thompson, IACCP®**

**Winebrenner Capital Management, LLC**

**10602 Timberwood Circle, Suite 13**

**Louisville, KY 40223-5367**

**(502) 671-0015**

**April2022**

**This Brochure Supplement provides information about Krista C. Thompson that supplements the Winebrenner Capital Management, LLC (“WCM”) Brochure (“Brochure”). You should have received a copy of that Brochure. Please contact Krista C. Thompson, Chief Compliance Officer at (502) 671-0015 or via email at [krista@wcmria.com](mailto:krista@wcmria.com) if you did not receive WCM’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Krista C. Thompson is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 - Educational Background and Business Experience

**Krista C. Thompson, IACCP® (CRD #7203547)**

Year of Birth: 1993

### EDUCATION:

Bachelor of Science (BS) in Finance at the University of Louisville in Louisville, KY (2015)

Master's in Business Administration (MBA) at University of Louisville College of Business in Louisville, KY (2016)

### EMPLOYMENT:

Chief Compliance Officer - Winebrenner Capital Management LLC (11/2019 to Present)

Client Service Associate - Winebrenner Capital Management LLC (09/2015 to 11/2019)

### PROFESSIONAL DESIGNATIONS:

#### **Investment Adviser Certified Compliance Professional® (IACCP®) (2021)**

The NRS Investment Adviser Certified Compliance Professional® (IACCP®) designation is awarded to knowledgeable, experienced individuals who complete an instructor-led program of in-person and/or online study, pass a certifying examination, and meet its work experience, ethics and continuing education requirements. The designation signifies intermediate-level knowledge of investment adviser regulation and compliance best practices, and adherence to nationally recognized professional standards and ethical leadership.

Exhaustive certification and course development, together with expert instructors and facilitators from the compliance, legal, regulatory, financial industry, and academic sectors, help ensure that individuals earning the IACCP designation have been trained, tested and certified to meet high industry professional standards.

Krista C. Thompson passed the Series 65 (NASAA-Investment Advisors Law Exam) license.

### **Item 3 - Disciplinary Information**

Winebrenner Capital Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Krista C. Thompson. No events have occurred that are applicable to this item.

### **Item 4 - Other Business Activities**

Krista C. Thompson is not actively engaged in any other investment-related business or occupation, or has an application pending to register as a broker-dealer, registered representative of a broker-dealer, futures commission merchant (“FCM”), commodity pool operator (“CPO”), commodity trading advisor (“CTA”), or as an associated person of an FCM, CPO, or CTA.

Additionally, she is not actively engaged in any other business or occupation for compensation not discussed above, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

### **Item 5 - Additional Compensation**

Krista C. Thompson does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services.

### **Item 6 - Supervision**

Winebrenner Capital Management, LLC has adopted, and periodically updates, a compliance manual that outlines for each employee the rules and regulations to which they must adhere. WCM has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, WCM has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact our Chief Compliance Officer at the telephone number or via email shown on the cover page of this Brochure Supplement.

### **Item 7 - Requirements for State-Registered Advisers**

Winebrenner Capital Management, LLC is an SEC registered investment adviser; therefore, this section is not applicable.



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Rebekah J. Ellis

Winebrenner Capital Management, LLC

10602 Timberwood Circle, Suite 13

Louisville, KY 40223-5367

(502) 671-0015

December 2019

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Additional information about Rebekah J. Ellis is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 - Educational Background and Business Experience

**Rebekah J. Ellis (CRD #6222864)**

Year of Birth: 1994

### EDUCATION:

Bachelor of Science (BS) in Accounting at the University of Louisville in Louisville, KY (2016)

## EMPLOYMENT:

Staff Accountant - Winebrenner Capital Management, LLC (07/2019 to Present)

Chief Financial Officer - Winebrenner Capital Management, LLC (11/2017 to 07/2019)

Staff Accountant - Winebrenner Capital Management, LLC (04/2013 to 11/2017)

Student - University of Louisville (08/2012 to 12/2016)

Hostess/Server - Mark's Feed Store (08/2011 to 03/2013)

Student - Butler Traditional High School (08/2008 to 05/2012)

## PROFESSIONAL DESIGNATIONS:

NONE

Rebekah J. Ellis currently holds the Series 65 (NASAA-Investment Advisors Law Exam) license.

### **Item 3 - Disciplinary Information**

Winebrenner Capital Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Rebekah J. Ellis. No events have occurred that are applicable to this Item.

### **Item 4 - Other Business Activities**

Rebekah J. Ellis is not actively engaged in any other investment-related business or occupation or has an application pending to register as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, she is not actively engaged in any other business or occupation for compensation not discussed above, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.



## **Item 5 - Additional Compensation**

Rebekah J. Ellis does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services.

## **Item 6 - Supervision**

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## **Item 7 - Requirements for State-Registered Advisers**

Winebrenner Capital Management, LLC is an SEC registered investment adviser; therefore, this section is not applicable.



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Martin T. Winebrenner

Winebrenner Capital Management, LLC

10602 Timberwood Circle, Suite 13

Louisville, KY 40223-5367

(502) 671-0015

April 2022

**This Brochure Supplement provides information about Martin T. Winebrenner that supplements the Winebrenner Capital Management, LLC (“WCM”) Brochure (“Brochure”). You should have received a copy of that Brochure. Please contact Krista C. Thompson, Chief Compliance Officer at (502) 671-0015 or via email at [krista@wcmria.com](mailto:krista@wcmria.com) if you did not receive WCM’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Martin T. Winebrenner is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 - Educational Background and Business Experience

**Martin T. Winebrenner (CRD #7024105)**

Year of Birth: 1993

### EDUCATION:

Bachelor of Arts (BA) in English at the University of Louisville in Louisville, KY (2015)

## EMPLOYMENT:

Real Estate Strategist - Winebrenner Capital Management LLC (04/2021 to Present)

Investment Adviser Representative - Winebrenner Capital Management LLC (09/2018 to 04/2021)

RIA Administrative Assistant - Winebrenner Capital Management LLC (12/2015 to 10/2019)

## PROFESSIONAL DESIGNATIONS:

NONE

Martin T. Winebrenner currently holds the Series 65 (NASAA-Investment Advisors Law Exam) license.

## **Item 3 - Disciplinary Information**

Winebrenner Capital Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Martin T. Winebrenner. No events have occurred that are applicable to this item.

## **Item 4 - Other Business Activities**

Martin T. Winebrenner is not actively engaged in any other investment-related business or occupation or has an application pending to register as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation not discussed above, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

## **Item 5 - Additional Compensation**

Martin T. Winebrenner does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services.

## **Item 6 - Supervision**

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## **Item 7 - Requirements for State-Registered Advisers**

Winebrenner Capital Management, LLC is an SEC registered investment adviser; therefore, this section is not applicable.