

# MACROVIEW

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## INVESTMENT MANAGEMENT LLC

MacroView Investment Management, LLC  
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Phone: (301) 907-6795

### **BROCHURE SUPPLEMENTS**

**February 2023**

**These brochure supplements provide biographical information about Daniel J. Cohen, Micah Patashnik, and Christopher T. Thomas. This information supplements the MacroView Investment Management, LLC brochure that you should have received previously. If you did not receive our brochure or if you have any questions about the contents of these Supplements, please contact our Chief Compliance Officer, Daniel J. Cohen at 301-907-6795 or [dcohen@macroviewim.com](mailto:dcohen@macroviewim.com)**

**Additional information about the individuals who are the subject of these Brochure Supplements is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **DANIEL J. COHEN**

### **Educational Background and Business Experience**

Daniel J. Cohen was born in 1963. He graduated in 1985 from the University of Michigan with a Bachelor's Degree. In 1989, he graduated from the State University of New York at Buffalo with a JD and an MBA.

Mr. Cohen has been an investment advisor representative with MacroView Investment Management LLC ("MacroView") since January 2010. He has been a member and managing director since May 2010 and became sole owner of MacroView in July 2015. In July 2012, he was named as the firm's Chief Compliance Officer.

Prior to joining MacroView, Mr. Cohen was a director and investment advisor representative with Chevy Chase Trust Company from October 2005 to December 2009. He was Vice President and investment advisor representative of Asset Management, Inc. from January 2003 to October 2005. He was a portfolio manager and investment advisor representative at Ayrshire Associates, Inc. from July 1997 to January 2003.

### **Disciplinary Information**

Daniel J. Cohen has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

### **Other Business Activities**

Mr. Cohen has no other business activities on which he spends time or which would present a conflict of interest.

### **Additional Compensation**

Mr. Cohen does not receive compensation from any third parties in connection with his advisory activities on behalf of MacroView Investment Management LLC.

### **Supervision**

As noted above, Mr. Cohen is the Chief Compliance Officer of MacroView. As such, he is responsible for developing, overseeing and enforcing the firm's compliance program, including its compliance procedures manual and code of ethics. Mr. Cohen's own advisory activities are supervised by Micah Patashnik. You can reach Mr. Patashnik at (301) 915-9954.

## MICAH PATASHNIK

### **Educational Background and Business Experience**

Micah Patashnik was born in 1990. He graduated in 2012 from American University with a Bachelor's Degree in Mathematics & Economics.

Mr. Patashnik is currently a Partner & Director at MacroView Investment Management LLC. He has been an Investment Advisor Representative at MacroView since July 2013.

Prior to joining MacroView Investment Management LLC, Mr. Patashnik was a full time student at American University from August 2008 until his graduation in May 2012. During that time he was also a Financial Intern at MacroView Investment Management LLC (September 2011 to May 2012), an Accounting Intern at Lighthouse Document Technologies (May 2010 to August 2010 & May 2009 to August 2009), and a Basketball Coach at Home Court (June 2007 to August 2008).

### **Disciplinary Information**

Mr. Patashnik has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

### **Other Business Activities**

Mr. Patashnik has a Life and Health Insurance License to solicit insurance products which he may receive a commission from. While not a consideration when making recommendations to clients, the payment of a commission, if any, could present a conflict of interest.

### **Additional Compensation**

Mr. Patashnik could receive compensation from insurance companies pursuant to his other business activities listed above.

### **Supervision**

Mr. Patashnik's advisory activities on behalf of MacroView are supervised by the firm's Chief Compliance Office, Daniel J. Cohen. This supervision is carried out in accordance with the firm's regulatory compliance program, including its compliance procedures manual and code of ethics. For more information, you can contact Mr. Cohen at (301) 907-6795.

## **CHRISTOPHER T. THOMAS**

### **Educational Background and Business Experience**

Christopher T. Thomas was born in 1980. He graduated in 2002 from James Madison University with a Bachelor's Degree in Finance

Mr. Thomas is currently a Director of Private Wealth Management & Retirement Plan Consulting at MacroView Investment Management LLC. He has been an investment advisor representative with MacroView since February 2018.

Prior to joining MacroView Investment Management LLC, Mr. Thomas served as a Family Wealth Advisor and Director of Corporate Retirement Plans at Planning Solutions Group from September 2013 to February 2018. Before joining Planning Solutions Group, Mr. Thomas served as a Financial Advisor at Signature Financial Partners from June 2002- September 2013.

### **Disciplinary Information**

Mr. Thomas has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

### **Other Business Activities**

Mr. Thomas has a Life and Health Insurance License to solicit insurance products which he may receive a commission from. While not a consideration when making recommendations to clients, the payment of a commission, if any, could present a conflict of interest.

### **Additional Compensation**

Mr. Thomas could receive compensation from insurance companies pursuant to his other business activities listed above.

### **Supervision**

Mr. Thomas advisory activities on behalf of MacroView are supervised by the firm's Chief Compliance Office, Daniel J. Cohen. This supervision is carried out in accordance with the firm's regulatory compliance program, including its compliance procedures manual and code of ethics. For more information, you can contact Mr. Cohen at (301) 907-6795.