

INVESTMENT ADVISOR BROCHURE

Part 2B

SIMS INVESTMENTMANAGEMENT, LLC

2101 Grandin Road, Suite A

Cincinnati, Ohio 45208

513-440-0418

www.simsinvestment.com

Brochure issue date: April 25, 2023

Cory Sims

Personal CRD Number: 6099496

This brochure supplement provides information about Cory Sims that supplements the Sims Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Cory Sims if you did not receive Sims Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Cory Sims is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

The Managing Member of Sims Investment Management, LLC is Cory K. Sims. Mr. Sims was born in 1988. Mr. Sims also acts as the sole Investment Advisor Representative for SIM. Mr. Sims received a BA, Business from the University of Cincinnati in 2011. Mr. Sims has passed the series 65 exam. Mr. Sims was associated with Johnson Investment Counsel, Inc. as a Co-op (June 2009 – May 2011) and Portfolio Manager Assistant (June 2011 – June 2012), and Valhalla Investment Advisory as an independent contractor (June 2012 – October 2012) and Investment Advisor Representative (October 2012 – November 2013).

Designations:

AWMA®

Individuals who hold the AWMA® designation have completed a course of study encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives, and asset protection alternatives. The program is designed for approximately 120-150 hours of self-study. The program is self-paced and must be completed within one year from enrollment.

CRPC®

Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. The program is designed for approximately 120-150 hours of self-study. The program is self-paced and must be completed within one year from enrollment.

CESTM stands for Certified Estate and Trust Specialist for Financial AdvisorsTM.

CESTM is a professional financial services designation granted by the Institute of Business & Finance (IBF) to those who have the following traits:

Qualification:

Each advisor must pass a series of exams and a written case study. All designees must complete continuing education requirements each year. Each student must meet experience and/or educational criteria.

Education:

CESTM candidates must complete a comprehensive advanced program designed to educate the advisor on every aspect of estate planning, postmortem planning and taxation.

Ethics:

All graduates must sign the IBF Code of Ethics and agree to adhere to the IBF Standards of Practice, both of which place the client's interests above those of the advisor and parent company.

Item 3: Disciplinary Information

Mr. Sims was involved in a disciplinary action while not licensed in the role of an investment adviser at a prior firm, Valhalla in which he earned and received compensation in return for acting as an investment adviser representative. Mr. Sims was ordered to cease and desist.

Item 4: Other Business Activities

Mr. Sims owns a rental property in Siesta Key, FL as of June 2022.

Item 5: Additional Compensation

None

Item 6: Supervision

Mr. Sims is the Managing Member and Chief Compliance Officer. As the Chief Compliance Officer, Mr. Sims is not supervised by anyone else. All of the supervised persons at SIMS Investment Management are supervised by Mr. Sims. The phone number for Cory Sims is (513) 278-7467.

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Brochure issue date: April 25, 2023

Blake A. Bagshaw

Personal CRD Number: 7114478

This brochure supplement provides information about Blake Bagshaw that supplements the Sims Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Blake Bagshaw if you did not receive Sims Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Blake Bagshaw is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Blake A. Bagshaw

Date of Birth: 03/09/1991

Education:

- 2009 - 2013 Attended Northern Kentucky University

Examinations and Professional Designations:

- Series 7 - General Securities Representative
- Series 66 - Uniform Combined State Law Examination

Business Experience:

- Investment Advisor Representative, Sims Investment Management, 2021 – Present
- Registered Representative, Valmark Securities, Inc. 2019-November 2021
- Investment Advisor Representative, Valmark Securities, Inc. 2020-November 2021
- Wealth Management Advisor, Farnsworth Financial Services, Inc., 2019 – November 2021
- District Manager & Restaurant General Manager, Bagshaw Enterprises, Inc., 2013-2018.

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

Blake A. Bagshaw is a 6.28% shareholder in Bagshaw Holdings, LLC. Acts as a Passive Investor.

Blake A Bagshaw is a 10% shareholder in Real Estate Investment Company, Arven Investments, LLC, and acts as a passive investor.

Blake A. Bagshaw has financial interest and ownership stake in AxisPoint Alliance LLC as well as Vsimple, which is a Delaware C Corp. He is on the Board of Directors for both companies. This is not investment related.

Item 5: Additional Compensation

Blake A. Bagshaw is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency.

Item 6: Supervision

As a representative of Sims Investment Management, LLC, Blake Bagshaw is supervised by Cory Sims, the firm's Chief Compliance Officer. Cory Sims is responsible for ensuring that Blake Bagshaw adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Cory Sims is (513) 278-7467.

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www.simsinvestment.com

Brochure issue date: April 25, 2023

Ryan Samuel Atkins

Personal CRD Number: 7440717

Investment Adviser Representative

This brochure supplement provides information about Ryan Samuel Atkins that supplements the Sims Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Ryan Samuel Atkins if you did not receive Sims Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan Samuel Atkins is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Ryan Samuel Atkins

Born: 1988

Education:

Bachelors Business Administration, University of Cincinnati - 2015

Business Background:

09/2021 - Present	Investment Adviser Representative Investment Management, LLC	Sims
08/2011 - Present	Asset Manager Retail Center Management	
09/2020 - Present	Author Binturong Books	

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

Ryan Samuel Atkins is a bookkeeper for property management company.

Ryan Samuel Atkins is an Author.

Item 5: Additional Compensation

Ryan Samuel Atkins does not receive any economic benefit from any person, company, or organization, other than Sims Investment Management, LLC in exchange for providing clients advisory services through Sims Investment Management, LLC.

Item 6: Supervision

As a representative of Sims Investment Management, LLC, Ryan Samuel Atkins is supervised by Cory Sims, the firm's Chief Compliance Officer. Cory Sims is responsible for ensuring that Ryan Samuel Atkins adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Cory Sims is (513) 278-7467.

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Brochure issue date: April 25, 2023

Michael Frank Perry

Personal CRD Number: 7695705

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Additional information about Cory Sims is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Michael F. Perry

Date of Birth: 12/05/1988

Education:

Bachelor of Science – Family Studies Major and Communications Minor, Miami (OH) University - 2012

Executive Certificate in Financial Planning, Xavier University – 2021

Examinations and Professional Designations:

Series 65 Uniform Investment Adviser Law Exam

Business Experience:

02/2023 - Present	Investment Adviser Representative Sims Investment Management, LLC , Cincinnati, OH
07/2012 – 01/2023	Floor Supervisor Family Nurturing Center, Cincinnati, OH

Item 3: Disciplinary Information

Mr. Perry has 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

Mr. Perry currently owns and manages a property, where he is also a tenant, and rents out additional space to two other tenants.

Item 5: Additional Compensation

Mr. Perry does not receive any economic benefit from any person, company, or organization, other than Sims Investment Management, LLC in exchange for providing clients advisory services through Sims Investment Management, LLC.

Item 6: Supervision

As a representative of Sims Investment Management, LLC, Michael Perry is supervised by Cory Sims, the firm's Chief Compliance Officer. Cory Sims is responsible for ensuring that Mr. Perry adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Cory Sims is (513) 278-7467.