

Item 1 Cover Page



Part 2B of Form ADV  
The Brochure Supplement

March 19, 2026

This brochure supplement provides information about Mark Stitzer Joseph J. Bridy, Christopher M. D'Agnes, Parker Brown Stitzer, Michael Tang, Charlie Harkin, Peter Burke, Brian Sergeant, Nathaniel Fierstein, and Parker Ellis Stitzer that supplements the accompanying Form ADV brochure of Hamlin Capital Management, LLC ("Hamlin"). You should have received a copy of that brochure. Please contact Hamlin's Chief Compliance Officer, Jeremi Roux, at (212) 752-8777 or [jroux@hamlincm.com](mailto:jroux@hamlincm.com) if you have any questions about the Form ADV brochure or this supplement, or if you would like to request additional or updated copies of either document.

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## **Mark Stitzer's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1960

*Penn State, BA History, 1982*

Mr. Stitzer is Hamlin's founder and Managing Partner since December 2001. His responsibilities include business development, marketing, and assisting the Hamlin Fixed Income Team with sourcing of potential investments. Mr. Stitzer's prior experience includes working at Trust Company of the West in 2001 as a Senior Vice President in Marketing, Crest Equity Management from 1999 - 2000 as a Managing Director, and Edgewood Management Co. from 1995 - 1998 as a Managing Director. From 1984 - 1995 Mr. Stitzer was a Managing Director at CS First Boston in the Institutional Fixed Income Department. While at CS First Boston, he managed the short-term tax-exempt money market and bond department. Mr. Stitzer also serves on the Board of Directors of the Marlu Foundation.

### Item 3: Disciplinary Information

Mr. Stitzer has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Stitzer or of Hamlin.

### Item 4: Other Business Activities

Hamlin shares common ownership with Hamlin Capital Advisors LLC ("HCA"), a registered municipal advisor, by certain Hamlin principals, including Mr. Stitzer. Please see Hamlin's ADV Part 2A for additional information and potential conflicts of interest pertaining to the relationship between Hamlin and HCA.

### Item 5: Additional Compensation

Mr. Stitzer does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Stitzer's investment recommendations are supervised by the Investment Committee. Mr. Stitzer's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Joseph J. Bridy's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1976

*Bucknell University, BA Finance and Economics, Cum Laude, 1998; Cornell University Johnson Graduate School of Management, MBA in Finance with High Distinction, May 2004.*

Mr. Bridy, Partner and Fixed Income Portfolio Manager, joined Hamlin in July 2004. Mr. Bridy manages Hamlin's Fixed Income Team. He oversees all fixed income commitments in addition to overseeing the sourcing and structuring of new fixed income investment opportunities. Prior to Hamlin Mr. Bridy was an analyst in the Fixed Income Division at Goldman Sachs. He then worked as an equity trader and junior portfolio manager at Oscar Capital LLC, a long-short equity hedge fund, founded by former Goldman Sachs executives. During his finance studies at Cornell, Mr. Bridy was awarded the AHA scholarship honoring academic excellence and the Dean's Leading Edge Award recognizing his outstanding contribution to the business school community. Mr. Bridy was a member of the MSRB's Investor Advisory Group, which advised the MSRB's Board of Directors on matters relating to municipal market practices and investor protection issues. He is currently the Vice Chair of the Board of Trustees at Berea College where he also serves as the Vice Chair of the Investment Committee that oversees the college's \$1.2 billion investment endowment and is a member of the Finance Committee that manages Berea's \$50 million annual operating budget. Mr. Bridy is also on the Geisinger Health Board of Directors. Geisinger is a physician-led system founded more than 100 years ago. Geisinger has 30,000 employees and consists of 13 hospital campuses, the Geisinger Health Plan, Geisinger Commonwealth School of Medicine and two research centers that serve more than three million people in Pennsylvania and southern New Jersey.

### Item 3: Disciplinary Information

Mr. Bridy has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Bridy or of Hamlin.

### Item 4: Other Business Activities

Hamlin shares common ownership with Hamlin Capital Advisors LLC ("HCA"), a registered municipal advisor, by certain Hamlin principals, including Mr. Bridy. Please see Hamlin's ADV Part 2A for additional information and potential conflicts of interest pertaining to the relationship between Hamlin and HCA.

### Item 5: Additional Compensation

Mr. Bridy does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Bridy's investment recommendations are supervised by the Investment Committee. Mr. Bridy's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Christopher M. D'Agnes Biographical Information**

Item 2: Educational Background and Business Experience

Born 1977

*Bucknell University, BS Business Administration, 1999*

Mr. D'Agnes, CFA, Partner and Equity Portfolio Manager, joined Hamlin in July 2001. His responsibilities include equity research, stock selection, and equity portfolio construction. Prior to Hamlin, Mr. D'Agnes was an analyst in the Municipal Capital Markets group at Merrill Lynch from 1999 to 2001, where he was involved in the structuring of derivative contracts for hospitals and other tax-exempt municipal issuers. He holds a Chartered Financial Analyst designation from the CFA Institute. In order to become a CFA charterholder, Mr. D'Agnes was required to: (1) pass three sequential, six hour examinations; (2) have at least four years of qualified professional investment experience; (3) maintain membership with the CFA Institute and local CFA chapter; and (4) agree to abide by the CFA Institute's Code of Ethics and Standards of Professional Conduct.

Item 3: Disciplinary Information

Mr. D'Agnes has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. D'Agnes or of Hamlin.

Item 4: Other Business Activities

Hamlin shares common ownership with Hamlin Capital Advisors LLC ("HCA"), a registered municipal advisor, by certain Hamlin principals, including Mr. D'Agnes. Please see Hamlin's ADV Part 2A for additional information and potential conflicts of interest pertaining to the relationship between Hamlin and HCA.

Item 5: Additional Compensation

Mr. D'Agnes does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. D'Agnes' investment recommendations are supervised by Investment Committee. Mr. D'Agnes' activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Parker Brown Stitzer's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1985

*Harvard University, BA Government, 2008*

*Columbia Business School, Columbia University, MBA, 2010*

Mr. P. B. Stitzer, Partner and Fixed Income Analyst, joined Hamlin in May of 2010. Mr. P. B. Stitzer's responsibilities on Hamlin's Fixed Income Team include credit analysis on existing and prospective investments as well as sourcing and structuring of new fixed income investments. Mr. P. B. Stitzer is also active in secondary fixed income trading activity.

### Item 3: Disciplinary Information

Mr. P. B. Stitzer has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. P. B. Stitzer or of Hamlin.

### Item 4: Other Business Activities

Mr. P. B. Stitzer is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. P. B. Stitzer does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. P. B. Stitzer's investment recommendations are supervised by Mr. Bridy as well as the Investment Committee. Mr. P. B. Stitzer's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Michael Tang's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1985

*Princeton University, BA Economics, Summa Cum Laude and Phi Beta Kappa, 2007*

Michael M. Tang, CFA, Partner and Equity Portfolio Manager, joined Hamlin Capital Management in January 2013. His responsibilities at Hamlin include equity research and portfolio management. Prior to joining Hamlin, Mr. Tang was an equity research associate at Barclays and helped cover the leisure and gaming equipment sectors. Previously, Mr. Tang was an investment banking analyst at Lehman Brothers, where he worked on convertible debt origination, accelerated share repurchases, and other derivative-related transactions as part of the Equity-Linked and Hybrid Solutions group. Mr. Tang holds a Chartered Financial Analyst designation from the CFA Institute. In order to become a CFA charterholder, Mr. Tang was required to: (1) pass three sequential, six hour examinations; (2) have at least four years of qualified professional investment experience; (3) maintain membership with the CFA Institute and local CFA chapter; and (4) agree to abide by the CFA Institute's Code of Ethics and Standards of Professional Conduct.

### Item 3: Disciplinary Information

Mr. Tang has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Tang or of Hamlin.

### Item 4: Other Business Activities

Mr. Tang is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. Tang does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Tang's investment recommendations are supervised by the Investment Committee. Mr. Tang's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Charlie Harkin's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1968

*Seton Hall University, BA Marketing, 1990*

*Fordham University, MBA in Finance, 1997*

Mr. Harkin, Trading and Operations Manager, joined Hamlin in June 2004. His responsibilities include management of the Hamlin Portfolio Administration Team, fixed income trade execution and allocation, and portfolio monitoring. Prior to Hamlin, Mr. Harkin worked at TIAA-CREF, where he managed the installation of new pension plans. Mr. Harkin holds a CPM designation from the Academy of Certified Portfolio Managers at Columbia University. In order to obtain the CPM designation, Mr. Harkin was required to: (1) have at least three years of qualified financial services employment; (2) complete a 200 hour independent study course; (3) attend a week-long program at Columbia University; (4) pass a comprehensive examination; (5) maintain the highest personal integrity and professional standards; and (6) complete 20 continuing education credits annually.

### Item 3: Disciplinary Information

Mr. Harkin has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Harkin or of Hamlin.

### Item 4: Other Business Activities

Mr. Harkin is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. Harkin does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Harkin's investment recommendations are supervised by Mr. Bridy, as well as the Investment Committee. Mr. Harkin's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Peter Burke's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1973

*Hobart College, BA English, 1996*

Mr. Burke joined Hamlin Capital Management in January 2016 as an equity trader. Prior to Hamlin, Mr. Burke was associated with the trading departments of Chilton Investment Company and Pequot Capital Management. Previously, Mr. Burke was an institutional equity sales trader at Merrill Lynch. He started his career in the Private Wealth Management division of Morgan Stanley.

### Item 3: Disciplinary Information

Mr. Burke has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Burke or of Hamlin.

### Item 4: Other Business Activities

Mr. Burke is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. Burke does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Burke's investment recommendations are supervised by Messrs. D'Agnes and Tang, as well as the Investment Committee. Mr. Burke's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Brian Sergeant's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1977

*Gettysburg College, BA Economics and Spanish, 1999*

*Baruch College Zicklin School of Business, MBA in Finance, 2008*

Mr. Sergeant joined Hamlin Capital Management in August 2008 as a portfolio administrator and became an equity trader in March 2011. Prior to Hamlin, Mr. Sergeant spent five years as a fund administrator at an alternative investment firm in New York. Previously, Mr. Sergeant worked as a Senior Associate in Portfolio Administration for the private client group at Zurich Scudder Investments.

### Item 3: Disciplinary Information

Mr. Sergeant has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Sergeant or of Hamlin.

### Item 4: Other Business Activities

Mr. Sergeant is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. Sergeant does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Sergeant's investment recommendations are supervised by Messrs. D'Agnes and Tang, as well as the Investment Committee. Mr. Sergeant's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.

## **Nathaniel Fierstein's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1992

*Bucknell University, BS Management, 2014*

Mr. Fierstein, CFA, CAIA joined Hamlin in May 2019 as a fixed income analyst. Mr. Fierstein's responsibilities on Hamlin's fixed income team include credit analysis on existing and prospective fixed income investment, as well as research and monitoring of municipal credit sectors. Mr. Fierstein is also active in secondary fixed income trading activity. Prior to joining Hamlin, he spent three years at Morgan Stanley where he worked in Private Wealth Management. Mr. Fierstein holds a Chartered Financial Analyst designation from the CFA Institute and is also a Chartered Alternative Investment Analyst (CAIA).

### Item 3: Disciplinary Information

Mr. Fierstein has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. Fierstein or of Hamlin.

### Item 4: Other Business Activities

Mr. Fierstein is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. Fierstein does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. Fierstein's investment recommendations are supervised by Mr. Bridy, as well as the Investment Committee. Mr. Fierstein's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement..

## **Parker Ellis Stitzer's Biographical Information**

### Item 2: Educational Background and Business Experience

Born 1996

*Brown University, BA American Studies, 2019*

*Columbia Business School, Columbia University, MBA, 2023*

Mr. P. E. Stitzer, Fixed Income Analyst, joined Hamlin in June of 2023. Mr. P. E. Stitzer's responsibilities on Hamlin's Fixed Income Team include credit analysis on existing and prospective investments, as well as research and monitoring of municipal credit sectors. Prior to joining Hamlin, he spent two years at Piper Sandler where he worked in the Investment Banking Group. Mr. P. E. Stitzer is also active in secondary fixed income trading activity.

### Item 3: Disciplinary Information

Mr. P. E. Stitzer has not been involved in any legal or disciplinary events that would be material to a client's or prospective client's evaluation of Mr. P. E. Stitzer or of Hamlin.

### Item 4: Other Business Activities

Mr. P. E. Stitzer is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Hamlin.

### Item 5: Additional Compensation

Mr. P. E. Stitzer does not receive economic benefits from any person or entity other than Hamlin in connection with the provision of investment advice to clients.

### Item 6: Supervision

Mr. P. E. Stitzer's investment recommendations are supervised by Mr. Bridy as well as the Investment Committee. Mr. P. E. Stitzer's activities are also overseen by the CCO, Mr. Jeremi Roux. Mr. Roux can be reached by calling the telephone number on the cover of this brochure supplement.