

# Jacobs & Co.

FORM ADV PART 2B\*

## SEC Required Brochure Supplement:

Professional Backgrounds of  
Matt D. Jacobson  
Thomas W. Newmeyer  
Adam P. Schneiberg

DECEMBER 2014

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\*This brochure supplement provides information about the qualifications of Jacob & Co.'s investment advisory personnel. This is a supplement to the Jacobs & Co. brochure which you should have received previously. Please contact the Firm's Chief Compliance Officer, Thomas W. Newmeyer if you have not received the brochure or if you have any questions about the contents of this supplement. Additional information about Jacobs & Co. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Each member of Jacobs & Co.'s professional staff is evaluated on the basis of his or her education and work experience. The Firm requires that all principals have a college degree and substantive investment-related work experience. In addition, any associated persons involved in determining investment strategy or giving investment advice to clients must meet the examination or other licensing requirements of the states in which they provide services. The following are the formal education and business background (last 10 years) for members of Jacobs & Co.'s professional staff, who determine the investment advice to be given to clients.

All Firm personnel are supervised by the Firm's principals and the Chief Compliance Officer. Supervision is ongoing and includes account reviews, trade supervision, annual compliance reviews including the forensic testing of Firm systems, staff meetings and employee reviews.

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## **Item 2 - Educational Background and Business Experience**

**MATT D. JACOBSON, General Partner and Portfolio Manager**

Born:

1956

Education:

University of California, Berkeley, BA Urban-Economic Geography, 1979

Professional Experience:

Jacobs & Co., General Partner, 2004 - present

Jacobs & Co., General Partner, 1988 - 2004

Jacobs & Co., Associate, 1979 - 1988

## **Item 3 - Disciplinary Information**

Matt Jacobson has no professional disciplinary disclosures.

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

Matt Jacobson does not engage in any outside business activities.

## **Item 5 - Additional Compensation**

Other than as may be disclosed in Item 12 of the Firm's Form ADV Part 2A related to unsolicited discounts on software or brokerage services from client custodians, neither the Firm nor any of its employees receive any economic benefit from any non-client for the provision of investment advisory services. Employees are not paid "sales awards" or other prizes for referring clients to the Firm.

## **Item 6 - Supervision**

All Firm personnel are supervised by Matt Jacobson and Thomas Newmeyer whose supervision is ongoing and includes account reviews, trade supervision, annual compliance reviews including the forensic testing of Firm systems, staff meetings and employee reviews.

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## **Item 2 - Educational Background and Business Experience**

**THOMAS W. NEWMAYER, General Partner, Portfolio Manager and Chief Compliance Officer**

### Born:

1970

### Education:

University of Colorado at Boulder, BA Japanese - 1992

### Professional Experience:

Jacobs & Co., General Partner, 2002 - present  
Jacobs & Co., Associate, 1998 - 2002

## **Item 3 - Disciplinary Information**

Thomas Newmeyer has no professional disciplinary disclosures.

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

Thomas Newmeyer does not engage in any outside business activities.

## **Item 5 - Additional Compensation**

Other than as may be disclosed in Item 12 of the Firm's Form ADV Part 2A related to unsolicited discounts on software or brokerage services from client custodians, neither the Firm nor any of its employees receive any economic benefit from any non-client for the provision of investment advisory services. Employees are not paid "sales awards" or other prizes for referring clients to the Firm.

## **Item 6 - Supervision**

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## **Item 2 - Educational Background and Business Experience**

**ADAM P. SCHNEIBERG, Director of Equity Research, Portfolio Manager**

### Born:

1967

### Education:

University of Pennsylvania, The Wharton School, MBA - 1996

University of Michigan, Ann Arbor, MI, BA Economics - 1990

### Professional Experience:

Jacobs & Co., Director of Equity Research, Portfolio Manager, 2014 - present

BTR Capital Management (private wealth), 2010 - 2014

Structural Wealth (private wealth), 2009 - 2010

Morgan Stanley Private Wealth Management, 2006 - 2008

Merrill Lynch Institutional Equity Sales, 2004 - 2006

RBC Capital Markets, Institutional Equity Sales, 2002-2004

## **Item 3 - Disciplinary Information**

Adam Schneiberg has no professional disciplinary disclosures.

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

Adam Schneiberg does not engage in any outside business activities.

## **Item 5 - Additional Compensation**

Other than as may be disclosed in Item 12 of the Firm's Form ADV Part 2A related to unsolicited discounts on software or brokerage services from client custodians, neither the Firm nor any of its employees receive any economic benefit from any non-client for the provision of investment advisory services. Employees are not paid "sales awards" or other prizes for referring clients to the Firm.

## **Item 6 - Supervision**

All Firm personnel are supervised by Matt Jacobson and Thomas Newmeyer whose supervision is ongoing and includes account reviews, trade supervision, annual compliance reviews including the forensic testing of Firm systems, staff meetings and employee reviews.