

*This brochure supplement provides information about Jacob R. Turner that supplements the Jim Saulnier & Associates, LLC brochure. You should have received a copy of that brochure. Please contact Jacob R. Turner if you did not receive Jim Saulnier & Associates, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Jacob R. Turner is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Jim Saulnier & Associates, LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Jacob R. Turner**

Personal CRD Number: 7827735

Investment Adviser Representative

Jim Saulnier & Associates, LLC  
506 East Mulberry St  
Fort Collins, CO 80524  
970-530-0556 ext. 107  
[jake@jimhelps.com](mailto:jake@jimhelps.com)

UPDATED: February 2024

## Item 2: Educational Background and Business Experience

**Name:** Jacob R. Turner

**Born:** 1981

### Educational Background and Professional Designations:

#### Education:

Bachelor of Science, University of Idaho, Moscow ID, 1999-2004  
Candidate for CFP Designation  
Enrolled Agent

#### Business Background:

07/2023 - Present	Investment Adviser Representative Jim Saulnier & Associates, LLC
09/2022-07/2023	Associate Financial Planner Financial Design Studio
11/2019-09/2022	Associate Director of Training AbbVie, Inc.
05/2018-11/2019	Regional Business Executive AbbVie, Inc.

## 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

Jacob R. Turner is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Jacob R. Turner does not receive any economic benefit from any person, company, or organization, other than Jim Saulnier & Associates, LLC in exchange for providing clients advisory services through Jim Saulnier & Associates, LLC.

### **Item 6: Supervision**

As a representative of Jim Saulnier & Associates, LLC, Jacob R. Turner is supervised by James Saulnier, the firm's Chief Compliance Officer. James Saulnier is responsible for ensuring that Jacob R. Turner 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 James Saulnier is (970) 530-0556.