

Part 2B of Form ADV: Brochure Supplement
Item 1. Cover Page
CRD #: 5363859



Jeffrey Michael Costa
Scholtz & Company, L.L.C.

Date of supplement: 03/12/2024

107 Elm Street, 5th Floor, Four Stamford Plaza, Stamford, CT 06902
Phone: 203-714-9900
Fax: 203-588 9032
www.scholtzandco.com

This brochure supplement provides information about Jeffrey Michael Costa that supplements the Scholtz & Company L.L.C. brochure. You should have received a copy of that brochure. Please contact Jeffrey Michael Costa if you did not receive Scholtz & Company, L.L.C.'s brochure or if you have questions about the contents of this supplement.

Additional information about Jeffrey Michael Costa is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Jeffrey Michael Costa, 37, is a Portfolio Manager and a Certified Financial Planner® who joined Scholtz & Company L.L.C. in 2020. He specializes in holistic financial planning as well as managing his clients' portfolios to meet their short and long term goals.

Prior to Scholtz & Company, Jeffrey worked for First County Advisors as a Trust & Investment Officer for four years. He began his career in financial services as a Financial Planner and Investment Adviser Representative at Barnum Financial Group, an office of MetLife, in 2009.

Jeffrey holds a B.A. in Economics and Political Science from the University of Connecticut. He has been a CFP® since 2017.

Item 3. Disciplinary Information

Jeffrey Michael Costa has no legal or disciplinary events to disclose.

Item 4. Other Business Activities

Jeffrey Michael Costa is not involved in any other business activities.

Item 5. Additional Compensation

Jeffrey Michael Costa does not receive any additional compensation.

Item 6. Supervision

Jeffrey Michael Costa, the supervised person is supervised by Peter Dwight Scholtz. Peter Dwight Scholtz monitors the advice the supervised person, Jeffrey Michael Costa provides to clients. All investments are discussed at our investment committee meetings. Peter Dwight Scholtz can be reached at 203-714-9900.

Item 7. Requirements for State-Registered Advisers

Jeffrey Michael Costa has no legal or disciplinary events to disclose.