

# Brochure Supplement

AUGUST 15, 2016

## PETER S. JACOBS

205 108th Avenue NE, Suite 570  
Bellevue, WA 98004

(425) 372-7482

This Brochure Supplement provides information about Peter S. Jacobs (CRD # 2508405) that supplements the Disclosure Brochure of Jacobs Broel Asset Management, LLC (hereinafter "JBAM"), a copy of which you should have received. Please contact JBAM's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Peter S. Jacobs is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Jacobs Broel Asset Management, LLC, a Registered Investment Adviser**

205 108th Avenue NE, Suite 570, Bellevue, WA 98004 | (425) 372-7481  
[www.jacobs-broel.com](http://www.jacobs-broel.com)

## Item 2. Educational Background and Business Experience

Born 1965

### Post-Secondary Education

University of Chicago Graduate School of Business | MBA, Business Administration | 1994

University of Cincinnati | B.S., Aerospace Engineering | 1989

### Recent Business Background

Jacobs Broel Asset Management, LLC | Principal | January 2011 – Present

Wells Fargo Investments, LLC | Director of Research | June 1994 – January 2011

### Professional Designation

Peter S. Jacobs holds the professional designation of Chartered Financial Analyst (“CFA”).

The CFA® charter is a credential awarded by the CFA Institute to individuals who meet its education, examination, sponsorship, experience and ethics requirements. To earn a CFA® charter, eligible candidates must have four years of qualified investment work experience, become a member of the CFA Institute, adhere to the Code of Ethics and Standards of Professional Conduct on an ongoing basis, and complete the CFA® program, which requires the passage of three separate six-hour examinations. Topics tested by the CFA Institute include ethical standards, quantitative methods, economics, financial reporting, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management.

For additional information about this credential, please refer directly to the website of the issuing organization.

## Item 3. Disciplinary Information

JBAM is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Peter S. Jacobs. JBAM has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

JBAM is required to disclose information regarding any investment-related business or occupation in which Peter S. Jacobs is actively engaged. JBAM has no information to disclose in relation to this Item.

### **Item 5. Additional Compensation**

JBAM is required to disclose information regarding any arrangement under which Peter S. Jacobs receives an economic benefit from someone other than a client for providing investment advisory services. JBAM has no information to disclose in relation to this Item.

### **Item 6. Supervision**

Peter S. Jacobs is a Principal of JBAM and is generally responsible for his own supervision. Peter S. Jacobs seeks to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by JBAM's clients.

### **Item 7. Requirements for State Registered Advisers**

JBAM is required to disclose information regarding Peter S. Jacobs's involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. JBAM has no information to disclose in relation to this Item.