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**1582 Main Street  
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[www.jlbainbridge.com](http://www.jlbainbridge.com)**

**Jerry Lee Bainbridge**  
CRD # 1899496

**PART 2B OF FORM ADV: BROCHURE SUPPLEMENT**

**March 8, 2023**

This ADV Brochure supplement provides information about the firm's advisory personnel as required by Rule 204-3 of the United States Securities and Exchange Commission ("SEC").

The information contained with this Brochure is current as of the above date and is subject to change at the firm's discretion.

If you have any questions about the contents of this Brochure or wish to receive a copy of the ADV Part 2 A, please contact Jennifer Chauvel at 941-296-7214.

Additional information about Jerry Lee Bainbridge (CRD #1899496) is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

## Educational Background and Business Experience

Jerry L. Bainbridge Born 1941.

### Education:

BS degree in Mathematics from Michigan State University in 1963.

### Business Background:

Founded J. L. Bainbridge & Co., Inc. in June 1981 after eight years of experience managing personal and family money. Jerry L. Bainbridge is Chief Executive Officer of J.L. Bainbridge & Co.

Prior to founding J.L. Bainbridge, Jerry L. Bainbridge was with the AT & T Company from 1963 thru 1987 in various engineering, sales, and management positions.

## Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Jerry L. Bainbridge has not been involved in any material legal or disciplinary events.

## Other Business Activities

Jerry has no other outside business activities

## Additional Compensation

Jerry L. Bainbridge receives compensation in three ways. He receives a base salary. He is paid compensation by the company for new assets brought to the firm. In addition, he receives a portion of the fees collected for the firm's services rendered. He also receives ownership profit distributions.

Jerry L. Bainbridge does not receive any additional compensation for the sale of products or from any other organization.

## Supervision

Jerry L. Bainbridge is the CEO and a principal owner of the firm. John Leeming a minority shareholder is the President and Chief Compliance Officer ("CCO") of the firm. Both Jerry L. Bainbridge and John Leeming serve on the Investment Committee, along with Joel Oldham, Senior Vice President/minority shareholder and D. Ryan Thompson, Vice President/minority shareholder and Marissa Buset Family Wealth Manager. Overall investment decisions specific to the JL Bainbridge Portfolio are made as a team by the Investment Committee. Each Investment Advisor Representative manages the individual client accounts on their own.

As the CCO, John Leeming is responsible for providing compliance oversight to the staff.



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**John B. Leeming, II CFP®**  
CRD # 4572850

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Additional information about John B. Leeming (CRD #4572850) is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

## Educational Background and Business Experience

**John B. Leeming, II CFP®**, Born 1958

Education:

Brown University A.B. Organizational Behavior 1981

Certified Financial Planner™, CFP® January 2006 CFP Board ID # 104485

Insurance Agent Florida Insurance License: # E045555 (Life, Health & Variable Annuity)

All continuing educational requirements are current, certifications and licenses are in good standing

Certified Financial Planner™ (CFP®)

Certified Financial Planner™ (CFP®) professional certification marks are granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university).

CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

Examination – Pass the comprehensive CFP® Certification Examination. The examination consists of two 3-hour sessions separated by a scheduled 40-minute break. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances;

Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and

Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

For information on Insurance Agent qualifications for the State of Florida please visit <https://www.myfloridacfo.com/Division/Agents/Licensure/General/docs/2-15.htm>  
Seven steps are required to obtain and maintain an Insurance Agent license in the State of Florida.

#### Business Background

Joined J.L. Bainbridge & Co., Inc. August 2003 in current capacity: President. John Leeming is a member of the Board of Directors of J. L. Bainbridge & Co., Inc. and is a member of the investment committee.

Prior to joining J.L. Bainbridge John Leeming was with the following organizations:

Intersecurities, Inc. - Registered Representative	01/2003-08/2003
Global Financial Advisory – Senior Investment Advisor	12/2002 -08/2003
SAL Financial Services, Inc.-Investment Consultant	10/2002-11/2002
Invest Financial Corp-Registered Rep./Independent Contractor	07/2002-10/2002
Method factory Inc.-Business Development-	01/2002-07/2002
LJL Enterprises -Consultant/Self-Employed	09/2001-12/2001
IXL-Vice President/Business Development	02/2000-09/2001
Nexgenix-Vice President/Business Development	06/1999-02/2000
Gateway Computer Associates-Vice President/Business Development	11/1998-06/1999

### Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. John B. Leeming, II has not been involved in any material legal or disciplinary events.

### Other Business Activities

The Field Club, Sarasota, FL, Board of Directors 01/2018- Present

### Additional Compensation

John B. Leeming, II receives compensation in three ways. He receives a base salary. He is paid compensation by the company for new assets brought to the firm. In addition, he receives a portion of the fees collected for the firm's services rendered. He also receives shareholder profit distributions.

John B. Leeming II does not receive any additional compensation for the sale of products or from any other organization.

### Supervision

Jerry L. Bainbridge is the CEO and a principal owner of the firm. John Leeming a minority shareholder is the President and Chief Compliance Officer ("CCO") of the firm. Both Jerry L. Bainbridge and John Leeming serve on the Investment Committee, along with Joel Oldham, Senior Vice President/minority shareholder and D. Ryan Thompson, Vice President/minority shareholder and Marissa Bursat Family Wealth Manager. Overall investment decisions specific to the JL Bainbridge Portfolio are made as a team by the Investment Committee. Each Investment Advisor Representative manages the individual client accounts on their own.

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**Joel G. Oldham  
CRD #2690996**

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Additional information about Joel Oldham (CRD #2690996) is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

## Educational Background and Business Experience

Joel G. Oldham was born 1968

### Education:

Bachelor of Science degree in Political Science from Arizona State University in 1993.

### Business Background:

Joined J.L. Bainbridge & Co., Inc. February 2002. His current capacity: Senior Vice President. Joel Oldham is a member of the investment committee.

Prior to joining J.L. Bainbridge, Joel Oldham was with the following organizations:

Charles Schwab & Co., Inc -Investment Consultant 1997-2002

## Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice . Joel G. Oldham has not been involved in any material legal or disciplinary events.

## Other Business Activities

Joel has no other Business Activities to report

## Additional Compensation

Joel G. Oldham receives compensation in three ways. He receives a base salary. He is paid compensation by the company for new assets brought to the firm. In addition, he receives a portion of the fees collected for the firm's services rendered. He also receives shareholder distributions.

Joel G. Oldham does not receive any additional compensation for the sale of products or from any other organization.

## Supervision

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**David Ryan Thompson a.k.a D. Ryan Thompson  
CRD #6826919**

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Additional information about D. Ryan Thompson (CRD #6826919) is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

## Educational Background and Business Experience

D. Ryan Thompson, CPA, Born 1989.

Education:

University of Central Florida May 2012, BSBA Economics BSBA Accounting

Certified Public Accountant, CPA January 2015 CPA License # AC48216

Series 65 License

All continuing educational requirements are current, certifications and licenses are in good standing.

### **CERTIFIED PUBLIC ACCOUNTANT**

The Certified Public Accountant (CPA) designation is the statutory title of qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements for certification as a CPA. Eligibility to sit for the Uniform CPA Exam requires a U.S. bachelor's degree which includes a minimum number of qualifying credit hours in accounting and business administration with an additional 1-year study. CPAs are required to take continuing education courses to renew their license, and most states also require their CPAs to take an ethics course during every renewal period.

The Series 65 License is received after one passes an Exam called the Uniform Investment Advisers Law Examination. the NASAA Investment Advisers Law Examination — is a North American Securities Administrators Association (NASAA) exam administered by FINRA.

The exam consists of 130 scored questions. Candidates have 180 minutes to complete the exam. In order for a candidate to pass the Series 65 exam, he/she must correctly answer at least 94 of the 130 scored questions.

### Business Background

Joined J.L. Bainbridge & Co., Inc. June 2017. His current capacity: Vice President. D. Ryan Thompson is a shareholder of J. L. Bainbridge & Co., Inc. and is a member of the investment committee.

Prior to joining J.L. Bainbridge D. Ryan Thompson was with the following organizations:

Wealth Pro Advisors-CPA	11/2015 5/2017
Cavanaugh & Company LLP-CPA	05/2012-05/2017
Student	08/2007-05/2012

### Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

It was discovered that D. Ryan Thompson was not properly registered with the State of Florida Office of Financial Regulation to provide investment advisory services, due to an administrative oversight. Upon discovering the oversight Mr. Thompson and the firm immediately acted to get Mr. Thompson properly registered. Mr. Thompson is now properly registered to provide investment advisory services effective 08/16/18.

### Other Business Activities

Treasurer- Sarasota Kiwanis Foundation – Non-Profit, Unpaid. Ryan spends approximately 1 hour during the trading day per month as the Treasurer for Sarasota Kiwanis Foundation.

Treasurer- Pines of Sarasota Management Corporation -Non-Profit, Unpaid. Ryan spends approximately 1.5 hours during the trading day per month as the Treasurer for Pines of Sarasota Management Corporation.

### Additional Compensation

D. Ryan Thompson receives compensation in three ways. He receives a base salary. He is paid compensation by the company for new assets brought to the firm. In addition, he receives a portion of the fees collected for the firm's services rendered. He also receives shareholder distributions.

D. Ryan Thompson does not receive any additional compensation for the sale of products or from any other organization.

### Supervision

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**Marissa Lee Burset CRD #7429945**

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Additional information about Marissa Lee Burset (CRD#7429945) is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

### Educational Background and Business Experience

Marissa Lee Burset, Born 1992.

#### Education:

Florida State University Bachelors – English Literature 2015

College of Central Florida – Associate Pre-Physical Therapy 2013

Series 65 License 2021

The Series 65 License is received after one passes an Exam called the Uniform Investment Advisers Law Examination. the NASAA Investment Advisers Law Examination — is a North American Securities Administrators Association (NASAA) exam administered by FINRA.

The exam consists of 130 scored questions. Candidates have 180 minutes to complete the exam. In order for a candidate to pass the Series 65 exam, he/she must correctly answer at least 94 of the 130 scored questions.

#### Business Background

Joined J.L. Bainbridge & Co., Inc. December 2019 as a Family Wealth Manager and Office Manager. As of October 2021 Marissa is a Family Wealth Manager.

Prior to joining J.L. Bainbridge & Co., Inc. Marissa Burset was with the following organizations:

Ayres, Cluster Law Firm – Florida Registered Paralegal

09/2011 – 09/2019

#### Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Marissa Burset has not been involved in any material legal or disciplinary events.

#### Other Business Activities

Marissa Burset has no other business activities.

#### Additional Compensation

Marissa Burset receives compensation in three ways. She receives a base salary. She is paid compensation by the company for new assets brought to the firm. In addition, she receives a portion of the fees collected for the firm's services rendered. She also receives shareholder distributions.

Marissa Burset does not receive any additional compensation for the sale of products or from any other organization.

### Supervision

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