

*This brochure supplement provides information about James Jacobson that supplements the Strategic Portfolio Managers brochure. You should have received a copy of that brochure. Please contact James Jacobson, Managing Member if you did not receive Strategic Portfolio Managers's brochure or if you have any questions about the contents of this supplement.*

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

**Strategic Portfolio Managers**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**James Jacobson**  
Investment Adviser Representative

Strategic Portfolio Managers  
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### **Item 1 Brochure Supplement**

This brochure supplement provides information about James Jacobson that supplements the Strategic Portfolio Managers brochure. His individual CRD number is 5819962. Please contact James Jacobson if the Firm brochure was not provided. Additional information about James Jacobson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

This Brochure Supplement is new as of March 21, 2023.

### **Item 2 Education Background and Business Experience**

James Jacobson  
Year of Birth: 1989

Education:

- BS Business Management, Northern Illinois University- 2011

Background:

- Managing Member, Strategic Portfolio Managers: 2021-Present
- Private Client Advisor, JP Morgan Securities, LLC: 2018-2021
- Sabbatical/Not Employed: 2016-2017
- Portfolio Specialist, RiverNorth Capital Management: 2016-2017
- Associate, JP Morgan Institutional Investments Inc.: 2013-2016

### **Item 3 Disciplinary Information**

Adviser has nothing to report under this section.

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

James Jacobson is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. SPM always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of SPM in their capacity as an insurance agent.

James Jacobson has indirect ownership interests in another Registered Investment Adviser. SPM and its members are not involved with the other Registered Investment Adviser and each of the entities are operated autonomously and independently.

James Jacobson has an ownership interest in Alpha Capital Partners, through which he conducts business consultation services such as loan acquisitions, private valuations, and cash flow analysis. Clients should be aware that this can involve a possible conflict of interest, as Alpha Capital Partners is paid a fee based on the total loan acquisition size giving James Jacobson an economic incentive to refer clients with a business to Alpha Capital Partners. James Jacobson will only recommend these services when it is in the best interest of the client. The client always has the right to decide whether to act on the recommendation and if you decide to do so, you can choose the professional of your choosing.

### **Item 5 Additional Compensation**

Neither Adviser nor any of its supervised persons is compensated in any way other than the investment advisory fees described in the ADV Part 2.

**Item 6 Supervision**

James Jacobson is supervised by Peleg Halpern, the Chief Compliance Officer of SPM. James Jacobson work is reviewed by Peleg through frequent office interactions as well as remote interaction. Peleg also reviews Jason's activities through our client management system. Peleg Halpern can be contacted at (847) 441-2600.

**Item 7**

James Jacobson has not been involved with any arbitration or administrative proceeding events.

James Jacobson has not been the subject of a bankruptcy petition.