# BRANDAN M. BREE

# INDIVIDUAL CRD # 6369478

# JACOBI CAPITAL MANAGEMENT LLC

# 154 ENTERPRISE WAY

# PITTSTON PA 18640

# (570) 826-1801

# www.jacobicapital.com

# CRD # 147663

# October 7, 2026

**Form ADV, Part 2B;** This Brochure Supplement, as required by the Investment Advisers Act of 1940, provides information about Brandan M. Bree, which supplements the Jacobi Capital Management LLC Form ADV, Part 2A Disclosure Brochure. You should have received a copy of the Brochure.

***This brochure supplement provides information about the qualifications and business practices of Jacobi Capital Management LLC ("JCM"). If you have any questions about the contents of this brochure, please contact us at (570) 826-1801. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission (SEC) or by any State Securities Authority.***

***Additional information about Brandan M. Bree and Jacobi Capital Management is available on the SEC's website at www.adviserinfo.sec.gov (click on the link, select "investment advisor representative" and type in the associated person's name or select "investment adviser firm" and type in our firm name). Results will provide you both Part 1 and 2 of our Form ADV or background information on the associated person.***

## Educational Background and Business Experience

Brandan M. Bree, born in 1996, graduated from the University of South Carolina in Columbia, South Carolina, with a Bachelor of Science Degree in Finance in 2018. Brandan joined Jacobi Capital Management as an Investment Advisor Representative in June 2024. He is licensed as a Registered Representative with LPL Financial Corp, starting May 2025. Prior to June 2024, Brandan worked as a Financial Planning Associate with Atlas Private Wealth Advisors from April 2022 to July 2023 and as an Investment Adviser Representative with Pillar Wealth Advisors, LLC from January 2024 to November 2024. He was also employed with eMoney Advisor in roles as an Associate Financial Planning Analyst from June 2018 to October 2019 and a Financial Planning Consultant from October 2019 to April 2022.

## Disciplinary Information

Jacobi Capital Management LLC is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each associated person providing investment advice.

There are no disclosures to mention for Brandan.

## Outside Business Activities

Aside from his work with Jacobi Capital Management, Brandan maintains status as a Registered Representative with LPL Financial Corp and is also licensed and approved as an independent insurance agent to sell whole life, term life, and universal life insurances, as well as long term care insurance, group annuities and fixed annuities. This activity may generate additional compensation for Brandan. Any commissions or compensation from these activities is separate from any investment advisory fees charged through JCM. This outside business activity consists of less than 40% of his time per year.

Other than what is discussed above, Brandan is not actively engaged in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant (“FCM”), commodity pool operator (“CPO”), commodity trading advisor (“CTA”), or an associated person of an FCM, CPO, or CTA.

The receipt of additional compensation from LPL or any outside insurance sales may give Brandan incentive to recommend investment products based on the compensation received, rather than on your investment needs. To address this, disclosure is made to the client at the time a brokerage account is opened through LPL, identifying the nature of the transaction or relationship, the role to be played by Brandan, and any compensation (e.g., commissions, 12b-1 fees) to be paid by the client and/or received by him.

Additionally, other than what is discussed above, he is not actively engaged in any other business activity or activities that provide a substantial source of income or involve a substantial amount of time.

## Additional Compensation

Brandan receives no economic benefit, including sales awards, other prizes, and any bonus that is based, even in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services.

## Other Business Names

Jacobi Capital Management LLC also conducts business under the name of Jacobi Wealth Advisors.

## Other Office Locations

Jacobi Capital Management LLC and Jacobi Wealth Advisors also have an office located at 1055 Westlakes Drive, Ste 135, Berwyn, PA 19312 and 1201 N Market Street, Ste 1002, Wilmington, DE 19801. An additional Jacobi Capital Management LLC location is 662 Main Street Ste 3, Sugarloaf, PA 18249.

## Other Websites

Jacobi Wealth Advisors also has a website which can be found at www.jacobiwealth.com.

## Supervision

Jacobi Capital Management LLC has adopted and periodically updates their Policies & Procedures Manual, which outlines for each associated person or employee the various rules and regulations they are required to adhere to. JCM has appointed a Chief Compliance Officer who reviews and monitors associated persons and employee activity with respect to the rules and regulations. In addition, JCM has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Annually, each associated person and employee is asked to recertify their commitment to the Code of Ethics. Should you have any questions related to these activities, please contact Jena Stacey, Chief Compliance Officer at (570)826-1801.

Jacobi Capital Management also retains a third-party compliance consultant to assist in oversight and adherence to regulations.