



LORI A. PIAZZA-TIMCHACK

INDIVIDUAL CRD #4941150

JACOBI CAPITAL MANAGEMENT LLC

620 BALTIMORE DRIVE

WILKES BARRE PA 18702

(570) 826-1801

[www.jacobicapital.com](http://www.jacobicapital.com)

CRD # 147663

March 31, 2021

**Form ADV, Part 2B;** This Brochure Supplement, as required by the Investment Advisers Act of 1940, provides information about Lori A. Piazza-Timchack, 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 Lori A. Piazza-Timchack and Jacobi Capital Management is available on the SEC’s website at [www.adviserinfo.sec.gov](http://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.***

Jacobi Capital Management, LLC A Registered Investment Advisor

Form ADV Part 2B Brochure Supplement

Lori A. Piazza-Timchack

## **Educational Background and Business Experience**

Lori A. Piazza-Timchack, was born in 1965. She has no formal degree taken after high school. Lori joined Jacobi Capital Management in January, 2021 as an Registered Assistant, simultaneously serving as a Licensed Assistant through LPL Financial. Lori transitioned to a Wealth Management Associate with Jacobi Capital in February, 2021 and is also licensed as a Registered Representative with LPL Financial Corp since February, 2021. Prior thereto, she worked with both Raymond James and Merrill Lynch as a Registered Client Services Associate.

## **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 Lori.

## **Outside Business Activities**

Aside from her work with Jacobi Capital Management, Lori maintains status as a Registered Representative with LPL Financial Corp and provided administrative support under the business name Integral Investment Group. These activities may generate additional compensation for Lori. Any commissions or compensation from this activity is separate from any investment advisory fees charged through JCM. These outside business activities consists of less than 30% of her time per year.

Other than what is discussed above, Lori is not actively engaged in any other investment-related business or occupation, nor does she 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 may give Lori 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 Lori, and any compensation (e.g., commissions, 12b-1 fees) to be paid by the client and/or received by Lori.

Additionally, other than what is discussed above, she 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**

Lori receives no economic benefit, including sales awards, other prizes, and any bonus that is based, at least 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. 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](http://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 are asked to recertify their commitment to this Code of Ethics. Should you have any questions related to these activities, please contact April L. Vinciarelli, Chief Compliance Officer, or Michael Hirthler, Managing Partner, at (570)826-1801.

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