WILLIAM F. MEDICO III

INDIVIDUAL CRD #4009117

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 William F. Medico III, 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 William F. Medico III 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

William F. Medico III, born 1978, graduated from Villanova University, in Villanova, Pennsylvania with a Bachelors of Business Administration Degree in Finance, 2000. William joined Jacobi Capital Management as an investment advisor representative in June, 2014. He is licensed as a Registered Representative with Financial Corp, starting June, 2014. Prior employment as a Registered Representative was at New England Securities from June, 2000 to June, 2014.

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 William.

Outside Business Activities

Aside from his work with Jacobi Capital Management, William maintains status as a Registered Representative with LPL Financial Corp. William also conducts non-variable life insurance business through various agencies and group benefit insurance business through various agencies. These activities may generate additional compensation for William. Any commissions or compensation from these activities is separate from any investment advisory fees charged through JCM. These outside business activities consist of less than 50% of his time per year.

Other than what is discussed above, William 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, Premiere Brokerage Services, Inc., Andus Health Benefits, via Jacobi Holdings, LLC, Penn Mutual Life Insurance Company, or other insurance companies, may give William 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 or a solicitation is made through Andus Health Benefits, or an application is submitted through Premiere Brokerage Services, Inc., Penn Mutual Life Insurance Company, or other insurance agency, identifying the nature of the transaction or relationship, the role to be played by William, and any compensation (e.g., commissions, 12b-1 fees) to be paid by the client and/or received by William.

Additionally, William is part of an LLC which generates Rental Income from a real estate investment. Otherwise, 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

William 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 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 are asked to recertify their commitment to this 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.