

**Item 1: Cover Page for Part 2B of Form ADV  
Brochure Supplement  
February 2020**

Jeff Adams

**ADAMS ASHBY FINANCIAL ADVISORS**

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**This brochure supplement provides information about Jeffrey Adams that supplements our brochure. You should have received a copy of that brochure. Please contact Jeffrey Adams, President and Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.**

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

## Item 2: Educational Background and Business Experience

### **Jeff Adams**

Year of Birth: 1963

#### **Formal Education:**

- 1985, U.C. Berkeley, BA in Economics

#### **Business Background:**

- 03/2009 – Present Adams Ashby Financial Advisors, President & Chief Compliance Officer
- 10/2004 – 03/2009 Citicorp Global Markets, Inc., Financial Advisor
- 01/1996 – 10/2004 Morgan Stanley DW Inc., Financial Advisor

#### **License/Exams:**

- 2014: Certified Financial Planner
- 1996: Series 7, 31, 63 & 65 Exams

#### **CFP® - CERTIFIED FINANCIAL PLANNER™:**

CERTIFIED FINANCIAL PLANNER™ (CFP®) certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam (administered in 10 hours over a 2 day period) and agreeing to be bound by the CFP board's standard of professional conduct. As a prerequisite the IAR must have a bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the standards of professional conduct.

## Item 3: Disciplinary Information

We have nothing to disclose in this regard.

## Item 4: Other Business Activities

Mr. Adams manages family owned real estate ventures through the Adams Family Revocable Trust of 1986 on behalf of Joan Adams and Jeffrey Adams Trustees. Mr. Adams devotes 33% of his time to this endeavor.

### **Item 5: Additional Compensation**

Mr. Adams does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Jeffrey Adams is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.