



# OAKWOOD CAPITAL

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

## *Jeffrey R. Schuur*

Investment Adviser Representative

Located in St. Louis Park, MN

(952) 935-2229

## **Form ADV Part 2B – Brochure Supplement**

Effective: January 22, 2024

This brochure supplement (“Supplement Brochure”) dated January 2024 provides information about Jeffrey Schuur that supplements Oakwood Capital, Inc.’s (“OC” or the “Firm”) Form ADV Part 2A (“Firm Brochure”). You should have received a copy of the Firm Brochure. If you did not receive OC’s Firm Brochure or if you have any questions about the contents of this Supplement Brochure, please contact Doug King at (952) 935-4601 or [compliance@oakwoodcapital.com](mailto:compliance@oakwoodcapital.com).

Additional information about Jeffrey Schuur is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The site is searchable by a unique identifying number known as a CRD number. Jeffrey Schuur’s CRD number is 2391965.

### **Item 2: Educational Background and Business Experience**

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**Jeffrey Schuur**

**CRD No. 2391965**

**Born: 1970**

## EDUCATIONAL BACKGROUND

Mr. Schuur is dedicated to advising clients of Oakwood Capital as an investment adviser representative. Mr. Schuur earned his Bachelor of Art in Economics from Gustavus Adolphus College. Additional information regarding Mr. Schuur's business background is included below.

## BUSINESS BACKGROUND

01/2014 – Present	Investment Adviser Representative	Oakwood Capital, Inc.
07/1995 – Present	Registered Representative	Oakwood Capital Securities, Inc.
7/1993 – 12/1994	Registered Representative	IDS Financial Services

## **Item 3: Disciplinary Information**

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**There are no legal, civil, or disciplinary events to disclose regarding Mr. Schuur.** Mr. Schuur has never been involved in any investment related regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Schuur.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Schuur.**

However, we do encourage you to independently view the background of Mr. Schuur on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD No. 2391965.

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

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Mr. Schuur is a registered representative with Oakwood Capital Securities, Inc. ("OCS"), an SEC registered broker-dealer, member of FINRA and affiliate of Oakwood Capital, Inc. In such capacity, Mr. Schuur sells securities through OCS and receives commissions. The potential for receipt of commissions and other compensation when Mr. Schuur directs securities transactions for client accounts through OCS may give Mr. Schuur an incentive to recommend investment products based on the compensation received, rather than on the client's needs. However, Mr. Schuur will only recommend securities transactions that he believes are suitable for the client's account and in the best interests of the client. Clients are not required to transact brokerage business with Mr. Schuur. Clients should be aware that similar services are available elsewhere through entities not affiliated with Mr. Schuur or Oakwood Capital, Inc.

Mr. Schuur is also a licensed insurance agent and may recommend and engage in the sale of insurance products offered by various insurance carriers for which he will receive additional compensation. Please be advised that there is a conflict of interest in that there is an economic incentive for Mr. Schuur to recommend insurance products offered through such insurance carriers. Any commissions received through the sales of insurance policies do not offset advisory fees the client may pay for advisory services provided by Oakwood Capital. Mr. Schuur strives to put his clients' interests first and foremost, and clients are not obligated to purchase insurance products through him and may seek similar services elsewhere.

Additionally, Mr. Schuur is an owner of JRS, LLC.

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

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Mr. Schuur does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through the Firm. However, Mr. Schuur receives commissions from sales of insurance products generated as an insurance agent and commissions for brokerage transactions effected through Oakwood Capital Securities, Inc.

### **Item 6: Supervision**

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Mr. Schuur serves as an investment adviser representative of Oakwood Capital and is supervised by Douglas S. King, the Chief Compliance Officer of Oakwood Capital. Oakwood Capital has implemented a policies and procedures manual and Code of Ethics which guides the Firm and its supervised persons in meeting their fiduciary obligations to Oakwood Capital' clients when providing investment advisory services. As Oakwood Capital' Chief Compliance Officer, Mr. Douglas S. King is responsible for the implementation of the Firm's policies and procedures and Code of Ethics. Mr. Douglas S. King may be contacted at (952) 935-4601 or [compliance@oakwoodcapital.com](mailto:compliance@oakwoodcapital.com) for more information about this Brochure Supplement.

Additionally, Oakwood Capital is subject to regulatory oversight by various agencies. These agencies require registration by Oakwood Capital and its supervised persons. As a registered entity, Oakwood Capital is subject to examinations by regulators, which can be announced or unannounced. Oakwood Capital is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.