

Form ADV Part 2B – Brochure Supplement  
Item 1: Cover Page  
January 2019

**Jack Zboralske**



Integrity ♦ Wisdom ♦ Character

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This brochure supplement provides information about Jack Zboralske that supplements our brochure. You should have received a copy of that brochure. Please contact Kenyon Lederer, Chief Compliance Officer, if you did not receive Pinnacle Asset Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Jack Zboralske is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD# 5256952.

## Item 2: Educational Background & Business Experience

**Jack Zboralske**

**Year of Birth:** 1963

### **Educational Background:**

- 1986: University of California, Davis; Bachelor of Science in Agricultural and Managerial Economics
- 1992: Washington University; Master of Business Administration

### **Business Background:**

- 11/2013 – Present Pinnacle Asset Management, Inc.; Investment Adviser Representative
- 11/2013 – Present Purshe Kaplan Sterling Investments, Inc.; Registered Representative
- 05/2009 – 11/2013 INVEST Financial Corporation; Financial Advisor
- 11/2006 – 05/2009 UBS Financial Services, Inc.; Financial Advisor
- 12/2003 – 11/2006 Partners Mortgage, Inc.; Mortgage Broker

### **Exams, Licenses & Other Professional Designations:**

- 2013: **Accredited Investment Fiduciary (AIF®)**
- 2007: Series 7 & 6 Exams
- 2007: California Insurance Licensed; License No. 0F58605

### **AIF® - Accredited Investment Fiduciary (AIF®):**

The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF® Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to your evaluation of Mr. Zboralske.

## Item 4: Other Business Activities

Mr. Zboralske is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

Mr. Zboralske is a registered representative of Purshe Kaplan Sterling Investments, Inc., member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Mr. Zboralske may earn and may not necessarily be in the best interests of the client.

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

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

### **Item 6: Supervision**

Kenyon Lederer, Principal and Chief Compliance Officer of Pinnacle Asset Management, Inc., supervises and monitors Mr. Zboralske's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Lederer if you have any questions about Mr. Zboralske's brochure supplement at (916) 772-0807.