



Burlington Alliance Capital Management, LLC

Supervised From:

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Located At:

10681 Gulf Blvd Suite 206

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(727) 300-1746

Jeffrey S. Schulz

Investment Adviser Representative

Individual CRD No. 5470980

Form ADV Part 2B – Brochure Supplement

Effective: August 22, 2022

This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Jeffrey S. Schulz as a supplement to the information contained in Burlington Alliance Capital Management, LLC’s (referred to as “we,” “our,” “us,” “Firm,” “Advisor,” or “Burlington Alliance”) Form ADV Part 2A Disclosure Brochure. You should have received a copy of that Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of Burlington Alliance’s Disclosure Brochure or this Brochure Supplement, please contact (336) 660-2782 or info@bacapitalmanagement.com.

Additional information about Mr. Schulz is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Schulz’s CRD number is 5470980.

Item 2: Educational Background and Business Experience

EDUCATIONAL BACKGROUND

Jeffrey S. Schulz, born in 1970, is dedicated to advising clients of Burlington Alliance as an Investment Adviser Representative. Mr. Schulz attended Texas Tech University Health Services Center where he earned a bachelor's degree in Physical Therapy. Additional information regarding Mr. Schulz's business background is included below.

BUSINESS BACKGROUND

07/2022 – Present	Investment Adviser Representative	Burlington Alliance Capital Management, LLC
11/2020 – Present	Owner, Insurance Agent	Premier FutureGuard
11/2015 – 01/2021	Physical Therapist	Self Employed – Physical Therapy

Item 3: Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Schulz. Mr. Schulz 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. Schulz.

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. Schulz.**

However, we do encourage you to independently view the background of Mr. Schulz on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 5470980.

Item 4: Other Business Activities

Mr. Schulz is 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. Schulz 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 Burlington Alliance. Mr. Schulz 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.

Item 5: Additional Compensation

Mr. Schulz does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through the Firm. However, Mr. Schulz receives commissions from sales of insurance products generated as an insurance agent.

Item 6: Supervision

Supervision of Mr. Schulz is performed by Chris Norris in his capacity as Chief Compliance Officer of Burlington Alliance. Burlington Alliance 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 Burlington Alliance's clients when providing investment advisory services. As Burlington Alliance's Chief Compliance Officer, Mr. Norris is responsible for the implementation of the Firm's policies and procedures and Code of Ethics. Mr. Norris may be contacted at (336) 660-2782 or info@bacapitalmanagement.com for more information about this Brochure Supplement.

Additionally, Burlington Alliance is subject to regulatory oversight by various agencies. These agencies require registration by Burlington Alliance and its supervised persons. As a registered entity, Burlington Alliance is subject to examinations by regulators, which can be announced or unannounced. Burlington Alliance 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.