

## **Part 2B of Form ADV: *Brochure Supplement***

### **James D. Oelschlager OAK ASSOCIATES, ltd.**

3800 Embassy Parkway  
Suite 310  
Akron, Ohio 44333-8398

Telephone: 330-668-1234  
Facsimile: 330-668-2901

September 2023

**This *Brochure Supplement* provides information about James D. Oelschlager that supplements the Oak Associates, ltd. firm brochure. You should have received a copy of that brochure. Please contact Margaret L. Ballinger (330-668-1234) if you did not receive Oak Associates, ltd.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about James D. Oelschlager is available of the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 2. Educational Background and Business Experience**

James D. Oelschlager, Co-Chief Investment Officer

Year of Birth: 1942

Education:

Mr. Oelschlager graduated from Denison University in 1964 with a B.A. in Economics. He graduated from Northwestern University School of Law in 1967 with a J.D. He attended the University of Chicago, Graduate School of Business from 1968 – 1969 - Graduate Studies

Business Background:

Co-Chief Investment Officer of Oak Associates, ltd. 10/2014 to present  
Investment Management of Oak Associates, ltd., 01/1996 to 12/2019  
Investment Management of Oak Associates, 03/1985 to 12/1995  
Asst. Treasurer, Director of Investment Management Pension Fund Assets of Firestone Tire & Rubber Company, 11/1969 to 03/1985

**Item 3. Disciplinary Information**

Mr. Oelschlager does not have any history of disciplinary or regulatory events to disclose.

**Item 4. Other Business Activities**

Mr. Oelschlager does not engage in any other business activity.

**Item 5. Additional Compensation**

Mr. Oelschlager does not receive any additional compensation from third parties for providing investment advice to its clients.

**Item 6. Supervision**

*Supervisory Reviews*

Margaret Ballinger has the overall responsibility for management of the firm. Robert Stimpson has the overall responsibility for the supervision of the Investment Team. The Ownership Group has responsibility for setting business strategies and initiatives, among other things. Margaret Ballinger can be reached at 330-668-1234.

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**Robert D. Stimpson  
OAK ASSOCIATES, ltd.**

3800 Embassy Parkway  
Suite 310  
Akron, Ohio 44333-8398

Telephone: 330-668-1234  
Facsimile: 330-668-2901

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**This *Brochure Supplement* provides information about Robert D. Stimpson that supplements the Oak Associates, ltd. firm brochure. You should have received a copy of that brochure. Please contact Margaret L. Ballinger (330-668-1234) if you did not receive Oak Associates, ltd.'s brochure or if you have any questions about the contents of this supplement.**

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

Robert D. Stimpson, Co-Chief Investment Officer and Portfolio Manager

Year of Birth: 1973

### Education:

Mr. Stimpson graduated from Dickinson College in 1995 with a B.A. in International Studies. He graduated from Emory University in 2001 with a M.B.A.

### Professional Designation:

Chartered Financial Analyst (CFA®) designation in 2003<sup>1</sup>  
Chartered Market Technician (CMT) designation in 2005<sup>2</sup>

### Business Background:

Portfolio Manager, Co-Chief Investment Officer at Oak Associates, Ltd, 12/2019 to present  
Research Analyst and Portfolio Manager of Oak Associates, Ltd., 2001 to 12/2019  
Equity Market Analyst of I.D.E.A., 1997 to 1999  
Financial Consultant of Merrill Lynch, 1995 to 1997

## **Item 3. Disciplinary Information**

Mr. Stimpson does not have any history of disciplinary or regulatory events to disclose.

## **Item 4. Other Business Activities**

Mr. Stimpson does not engage in any other business activity.

## **Item 5. Additional Compensation**

Mr. Stimpson does not receive any additional compensation from third parties for providing investment advice to its clients.

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<sup>1</sup> **Chartered Financial Analyst (CFA®)** This designation is offered by the CFA Institute (formerly the Association for Investment Management and Research [AIMR]). To obtain the CFA charter, candidates must successfully complete three difficult exams and gain at least three (3) years of qualifying work experience, among other requirements. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

<sup>2</sup> **Chartered Market Technician (CMT)** This designation is offered by the Market Technicians Association (MTA). To obtain the CMT credential, candidates must successfully complete three levels of examinations and obtain approval from the MTA Admissions Committee and Board of Directors. In passing these exams, candidates demonstrate their mastery of a core body of knowledge of investment risk in portfolio management settings.

**Item 6. Supervision**

***Supervisory Reviews***

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**Jeffrey B. Travis**  
**OAK ASSOCIATES, ltd.**

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Suite 310  
Akron, Ohio 44333-8398

Telephone: 330-668-1234  
Facsimile: 330-668-2901

September 2023

**This *Brochure Supplement* provides information about Jeffrey B. Travis that supplements the Oak Associates, ltd. firm brochure. You should have received a copy of that brochure. Please contact Margaret L. Ballinger (330-668-1234) if you did not receive Oak Associates, ltd.'s brochure or if you have any questions about the contents of this supplement.**

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

Jeffrey B. Travis, Portfolio Manager and Senior Research Analyst

Year of Birth: 1974

### Education:

Mr. Travis graduated from Denison University in 1997 with a B.A. in Economics. He graduated from Case Western Reserve University in 2000 with a M.B.A.

### Professional Designation:

Chartered Financial Analyst (CFA) designation in 2004<sup>2</sup>

### Business Background:

Portfolio Manager and Senior Research Analyst of Oak Associates, Ltd., 03/2019 to present  
Principal and Equity Market Analyst of Winslow Asset Management, 2009 to 03/2019  
Director of Research of Broadleaf Partners, 2006 to 2009  
Portfolio Manager of Oak Associates, Ltd., 1997 to 2006

## **Item 3. Disciplinary Information**

Mr. Travis does not have any history of disciplinary or regulatory events to disclose.

## **Item 4. Other Business Activities**

Mr. Travis does not engage in any other business activity.

## **Item 5. Additional Compensation**

Mr. Travis does not receive any additional compensation from third parties for providing investment advice to its clients.

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<sup>2</sup> **Chartered Financial Analyst (CFA<sup>®</sup>)**

This designation is offered by the CFA Institute (formerly the Association for Investment Management and Research [AIMR]). To obtain the CFA charter, candidates must successfully complete three difficult exams and gain at least three (3) years of qualifying work experience, among other requirements. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**Item 6. Supervision**

***Supervisory Reviews***

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