

*This brochure supplement provides information about Jordan Ladd Kimmel Mr. that supplements the ValuEngine Capital Management LLC brochure. You should have received a copy of that brochure. Please contact Jordan Ladd Kimmel Mr. if you did not receive ValuEngine Capital Management LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Jordan Ladd Kimmel Mr. is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **ValuEngine Capital Management LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Jordan Ladd Kimmel**

Personal CRD Number: 1442791

Investment Adviser Representative

ValuEngine Capital Management LLC  
1900 S Harbor City Blvd Suite 328  
Melbourne, FL 32901  
(908) 202-1971  
[jkimmel@ValuEngineCapital.com](mailto:jkimmel@ValuEngineCapital.com)

UPDATED: 10/31/2022

## Item 2: Educational Background and Business Experience

**Name:** Jordan Ladd Kimmel      **Born:** 1958

### **Educational Background and Professional Designations:**

#### **Education:**

BA Economics, SUNY @ Stony Brook - 1981 MS Urban & Policy Sciences, SUNY @ Stony Brook - 1981 Graduated from The Bronx High School of Science

#### **Business Background:**

10/2021 to Present - Chief Equity Strategist and Portfolio Manager, ValuEngine Capital Management LLC

05/2020 to 10/2021 - Registered Representative, Lebenthal Financial Services, Inc.

05/2020 to 10/2021 - Chief Equity Strategist and Portfolio Manager, Lebenthal Global Advisors

10/2017 to 05/2020 - Registered Representative, Vanderbilt Securities

10/2017 to 05/2020 - Portfolio Manager, Gitterman Wealth Management

04/2015 - 10/2017 - Managing Member - Facts Asset Management LLC

Mr. Kimmel is the creator of FACTS®, a holistic unbiased quantitative measurement of the “integrity” of over 2,000 public companies. FACTS® identifies companies with strong leadership, core values and ethical cultures. The strategy blends financial stability with forensic accounting, corporate governance, transparency, and sustainability metrics for the largest and most liquid companies. FACTS®, incorporates his previous model Magnet®, which was licensed to prominent institutions. Mr. Kimmel has written three books on investing; the most recent is The Magnet Method of Investing (Wiley 2009). Over his career, Jordan has made hundreds of appearances on CNBC, Fox News and ABC News, and has been quoted extensively in print including a feature in Forbes Magazine on June 7, 2004. He is also frequently invited as a keynote speaker at investment industry meetings and national conferences.

## Item 3: Disciplinary Information

Jordan Kimmel has not been subject to any criminal or civil actions, administrative proceedings, self-regulatory organization (SRO) proceedings, revocations, or suspensions.

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

Jordan Ladd Kimmel is a Managing Member of Magnet Fund L.P.

Jordan Ladd Kimmel is the author of the book "Invest in the Now".

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

Jordan Ladd Kimmel does not receive any economic benefit from any person, company, or organization, other than ValuEngine Capital Management LLC in exchange for providing clients advisory services through ValuEngine Capital Management LLC.

#### **Item 6: Supervision**

As a representative of ValuEngine Capital Management LLC, Jordan Ladd Kimmel is supervised by Paul Henneman, the firm's Chief Compliance Officer. Paul Henneman is responsible for ensuring that Jordan Ladd Kimmel adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Paul Henneman is (321) 325-0519.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Mr. Jordan Ladd Kimmel has not been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Mr. Jordan Ladd Kimmel has not been the subject of a bankruptcy petition.