

Part 2B of Form ADV: *Brochure Supplement*

James D. Oelschlager OAK ASSOCIATES, ltd.

3875 Embassy Parkway
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Akron, Ohio 44333-8355

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

March 2022

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.

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.**

3875 Embassy Parkway
Suite 250
Akron, Ohio 44333-8355

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

March 2022

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 2003¹
Chartered Market Technician (CMT) designation in 2005²

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.

¹ **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.

² **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

Margaret Ballinger has the overall responsibility for management of the firm. Robert Stimpson has 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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**Jeffrey B. Travis
OAK ASSOCIATES, Ltd.**

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Facsimile: 330-668-2901

March 2022

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 2004²

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.

² **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.

Item 6. Supervision

Supervisory Reviews

Margaret Ballinger has the overall responsibility for management of the firm. Robert Stimpson has 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.