



JARVIS

FINANCIAL

33308 13th Pl S. Ste #3
Federal Way, Washington, 98003
(253) 838-9703
Info@JarvisFinancial.com



Jarvis Financial Services, Inc.

Form ADV Part 2B – Supplemental Disclosure Brochure

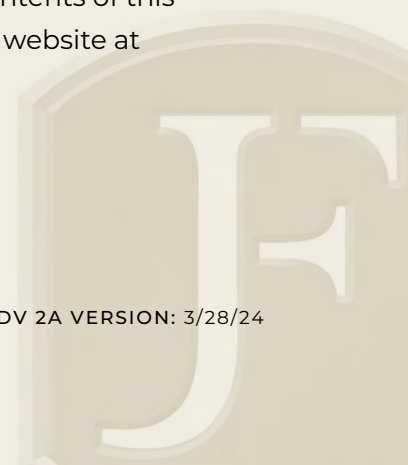
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Matthew Paul Jarvis

Personal CRD Number: 4703256

Investment Advisor Representative

This brochure supplement provides information about Matthew Paul Jarvis that supplements the Jarvis Financial Services, Inc. brochure. You should have received a copy of that brochure. Please contact us at the telephone number or e-mail address reflected above, if you did not receive Jarvis Financial Services, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Matthew is also available on the SEC's website at www.adviserinfo.sec.gov.



EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Name: Matthew Paul Jarvis

Born: 1981

Education Background and Professional Designations:

Matthew has been providing comprehensive financial planning advice to clients since 2003. In addition to the education listed below, Matthew reviews an estimated 5,000 pages of financial text annually and attends training conferences across the country. This commitment to ongoing education enables Matthew to advise clients on the state of the investment markets and to manage their accounts accordingly.

Education

B.S. Business Administration - Finance, Thomas Edison – 2012

Designations:

CFP® - Certified Financial Planner™

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;

Experience – (1) Complete at least three years (at least 6,000 hours) of full-time financial planning-related experience or (2) complete at least two years (at least 4,000) of full-time financial planning-related experience while under the supervision of a CFP® professional; and

Ethics – Agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- **Ethics** – Renew an agreement to be bound by the Code of Ethics and Standards of Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

ChFC® - Chartered Financial Consultant®

ChFC® Minimum Qualifications:

- Bachelor’s degree or its equivalent, in any discipline, from an accredited university, this qualifies as one year of business experience.
- Three years of full-time business experience is required; this three-year period must be within the five years preceding the date of the award (part-time qualifying business experience is also credited toward the three-year requirement with 2,000 hours representing the equivalent of one year fulltime experience).
- Must fulfill the ChFC® seven course curriculum, as well as two additional elective courses.
- Pass the exams for all required and elective courses.
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation or ethical violations. The CFP board verifies all employment history, qualifications and disciplinary issues via FINRA’s Central Registration Depository.

Business Background	08/2003 – Present	Employee/Owner Jarvis Financial Services, Inc.
	03/2013 – Present	Investment Advisor Representative, Jarvis Financial Services, Inc.
	01/2018 – Present	Independent Consultant - TPR & RTS
	03/2006 – 09/2018	Registered Representative, Crown Capital Securities



*Item 3***DISCIPLINARY INFORMATION**

Matthew has no legal or disciplinary events to disclose.

*Item 4***OTHER BUSINESS ACTIVITIES**

Matthew provides coaching and consulting to other financial advisors around the country through his involvement with The Perfect RIA (TPR) and Retirement Tax Services (RTS, a tax preparation service). This does not create a conflict of interest with his role as an advisor. (See additional information regarding RTS in Item 10 of Jarvis Financial Service, Inc.'s Form ADV Part 2A)

Matthew is also actively engaged in his community and serves in various roles with numerous local organizations. All of these activities are on a pro-bono basis and do not conflict with his role as an investment advisor representative of Jarvis Financial Services, Inc.

*Item 5***ADDITIONAL COMPENSATION**

Other than as described in Item 4 above, Matthew does not receive any economic benefit from any other person, company, or organization, in exchange for providing clients advisory services through Jarvis Financial Services, Inc.

*Item 6***SUPERVISION**

As the owner and Chief Compliance Officer of Jarvis Financial Services, Inc., Matthew supervises all duties and activities of the firm. Matthew's contact information is on the cover page of this disclosure document. Matthew adheres to all required regulations regarding the activities of an investment advisor representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.





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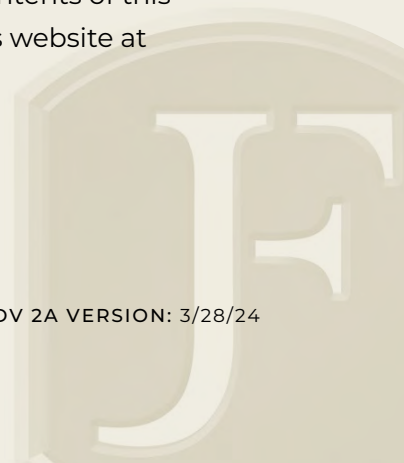
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Nathaniel Paul Jarvis

Personal CRD Number: 2295380

Investment Advisor Representative

This brochure supplement provides information about Nathaniel Paul Jarvis that supplements the Jarvis Financial Services, Inc. brochure. You should have received a copy of that brochure. Please contact us at the telephone number or e-mail address reflected above, if you did not receive Jarvis Financial Services, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Nathaniel is also available on the SEC's website at www.adviserinfo.sec.gov.



EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Name: Nathaniel Paul Jarvis

Born: 1957

Education Background and Professional Designations:

Education:

ChFC, American College – 1995 (Voluntarily Lapsed in 2010)

Nathaniel Paul Jarvis has taken courses at Ricks College and Green River College.

Designations:

CFP® - Certified Financial Planner™

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Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;

Experience – (1) Complete at least three years (at least 6,000 hours) of full-time financial planning-related experience or (2) complete at least two years (at least 4,000) of full-time financial planning-related experience while under the supervision of a CFP® professional; and

Ethics – Agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- **Ethics** – Renew an agreement to be bound by the Code of Ethics and Standards of Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background	08/1990 - Present	Financial Planner / Consultant, Jarvis Financial Services, Inc.
	03/2013 - Present	Investment Advisor Representative, Jarvis Financial Services, Inc.
	01/2018 - Present	Independent Consultant
	03/2006 - 09/2018	Registered Representative, Crown Capital Securities

Item 3 **DISCIPLINARY INFORMATION**

Nathaniel has no legal or disciplinary events to disclose.

Item 4 **OTHER BUSINESS ACTIVITIES**

Nathaniel is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as undisclosed commissionable products conflict with the fiduciary duties of a registered investment advisor. Jarvis Financial Services, Inc. always acts in the best interest of the client, including the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Jarvis Financial Services, Inc. in such individual’s capacity as a licensed insurance agent. Mr. Jarvis spends less than 5 hours per month on his outside business activities.



*Item 5***ADDITIONAL COMPENSATION**

Other than as described in Item 4 above, Nathaniel does not receive any economic benefit from any other person, company, or organization, in exchange for providing clients advisory services through Jarvis Financial Services, Inc.

*Item 6***SUPERVISION**

As an investment advisor representative of Jarvis Financial Services, Inc., Nathaniel's activities are supervised by the firm's Chief Compliance Officer, Matthew P. Jarvis. Matthew can be reached by phone at (253) 898-9703. All advice provided to client is reviewed by Matthew prior to implementation. Nathaniel's contact information is on the cover page of this disclosure document.





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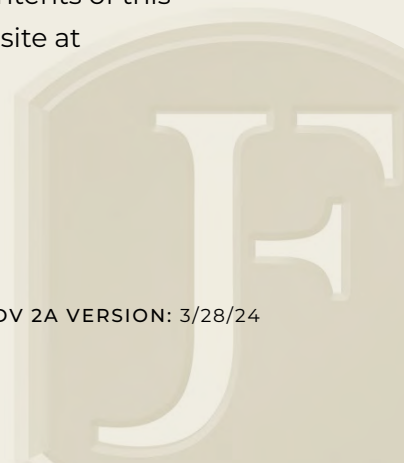
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Rhys Colby Cooper

Personal CRD Number: 6870764

Investment Advisor Representative

This brochure supplement provides information about Rhys Colby Cooper that supplements the Jarvis Financial Services, Inc. brochure. You should have received a copy of that brochure. Please contact us at the telephone number or e-mail address reflected above, if you did not receive Jarvis Financial Services, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Rhys is also available on the SEC's website at www.adviserinfo.sec.gov.



EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Name: Rhys Colby Cooper

Born: 1991

Education Background and Professional Designations:

Education:

B.S. Business Analytics, University of Tennessee at Chattanooga – 2018

Designations:

CFP® - Certified Financial Planner™

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Experience – (1) Complete at least three years (at least 6,000 hours) of full-time financial planning-related experience or (2) complete at least two years (at least 4,000) of full-time financial planning-related experience while under the supervision of a CFP® professional; and

Ethics – Agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.



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- **Ethics** – Renew an agreement to be bound by the Code of Ethics and Standards of Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background	10/2023 - Present	Financial Planner / Consultant, Jarvis Financial Services, Inc.
	08/2018 - 10/2023	Wealth Advisor Financial Insights

Item 3 **DISCIPLINARY INFORMATION**

Rhys has no legal or disciplinary events to disclose.

Item 4 **OTHER BUSINESS ACTIVITIES**

Rhys has no outside business activities.

Item 5 **ADDITIONAL COMPENSATION**

Other than as described in Item 4 above, Rhys does not receive any economic benefit from any other person, company, or organization, in exchange for providing clients advisory services through Jarvis Financial Services, Inc.

Item 6 **SUPERVISION**

As an investment advisor representative of Jarvis Financial Services, Inc., Rhys' activities are supervised by the firm's Chief Compliance Officer, Matthew P. Jarvis. Matthew can be reached by phone at (253) 898-9703. All advice provided to client is reviewed by Matthew prior to implementation. Rhys’ contact information is on the cover page of this disclosure document.



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Form ADV Part 2B – Supplemental Disclosure Brochure

for

Allen Lee Gentry, IV

Personal CRD Number: 7415128

Investment Advisor Representative

This brochure supplement provides information about Allen Lee Gentry, IV that supplements the Jarvis Financial Services, Inc. brochure. You should have received a copy of that brochure. Please contact us at the telephone number or e-mail address reflected above, if you did not receive Jarvis Financial Services, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Allen is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Name: Allen Lee Gentry, IV

Born: 1997

Education Background and Professional Designations:

B.S. Business Administration, Central Washington University – 2021

Business Background	01/04/2023 - Present	Paraplanner Jarvis Financial Services, Inc.
	07/21/2021 - 11/02/2022	Ameriprise Financial Services, LLC
	01/03/2017 - 06/18/2021	CWU
	01/2016 - 12/2016	Valley Buick GMC

Designations:

APMA® – Accredited Portfolio Management AdvisorSM

Individuals who hold the APMA® designation have completed a course of study encompassing client assessment and suitability, risk/return, investment objectives, bond and equity portfolios, modern portfolio theory and investor psychology. Students have hands-on practice in analyzing investment policy statements, building portfolios, and making asset allocation decisions including sell, hold and buy decisions within a client’s portfolio. The program is designed for 80-100 hours of self-study. The program is self-paced and must be completed within one year from enrollment.

Continuing Education (CE)

To maintain the APMA® designation, individuals are required every two years to complete 16 hours of continuing education, reaffirm adherence to the Standards of Professional Conduct and comply with self-disclosure requirements. To learn more about the APMA® designation, visit <https://www.cffp.edu/>

Item 3

DISCIPLINARY INFORMATION

Allen has no legal or disciplinary events to disclose.



Item 4 **OTHER BUSINESS ACTIVITIES**

Allen is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as undisclosed commissionable products conflict with the fiduciary duties of a registered investment advisor. Jarvis Financial Services, Inc. always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Jarvis Financial Services, Inc. in such individual's capacity as a licensed insurance agent. Allen spends approximately two hours per month on his outside business activities.

Item 5 **ADDITIONAL COMPENSATION**

Other than as described in Item 4 above, Allen does not receive any economic benefit from any other person, company, or organization, in exchange for providing clients advisory services through Jarvis Financial Services, Inc.

Item 6 **SUPERVISION**

As an investment advisor representative of Jarvis Financial Services, Inc., Allen's activities are supervised by the firm's Chief Compliance Officer, Matthew P. Jarvis. Matthew can be reached by phone at (253) 898-9703. All advice provided to client is reviewed by Matthew prior to implementation. Allen's contact information is on the cover page of this disclosure document.

