

***Cover Page***

**JASON L. MCCALED**

**1630 East White Mountain Blvd.  
Suite D3  
Pinetop, AZ 85935**

**Phone: (928) 358-4314**

June 1, 2018

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Jason L. McCaleb that supplements the SharpePoint, LLC brochure. You should have received a copy of that brochure. Please contact Jason L. McCaleb if you did not receive a SharpePoint, LLC's brochure or if you have questions about this supplement. Mr. McCaleb's CRD number is 3251665.**

**Additional information about Jason L. McCaleb is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Educational Background and Business Experience***

Jason L. McCaleb  
Investment Advisor Representative  
Year of Birth: 1974

**Business Background:**

SharpePoint, LLC, Investment Advisor Representative, April 2018 - Present

Good Life Advisors, LLC, Financial Advisor, December 2014 – April 2018

LPL Financial, LLC, Registered Representative, July 2013 – April 2018

Private Advisor Group, LLC, Investment Advisor Representative, July 2013 – December 2014

W&R Insurance Agencies, Insurance Agent, October 2011 - July 2013

Waddell & Reed, Inc., Associated Person, October 2011 - July 2013

Northern Arizona Wealth Management, Inc. DBA McCaleb Wealth Management, President, October 2011 – July 2013

Edward Jones, Investment Advisor Representative, September 2002 – October 2011

**Educational Background:**

Brigham Young University, Provo, UT, Bachelor of Science in Finance, Graduated: 2000

Brigham Young University, ID, Associates Degree in Marketing, Graduated: 1997

**RELEVANT DESIGNATIONS:**

**CERTIFIED FINANCIAL PLANNER <sup>TM</sup> Practitioner (CFP®)**

This program is sponsored by the CFP Board of Standards. Before applying for the CFP® Certification Examination, you need to meet the six course education requirements (or their equivalent) as set by CFP Board as well as a financial plan development course registered with CFP Board. Additionally, a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university is required to attain CFP® certification. Additional requirements include successful completion of the CFP® Certification Examination, which tests your ability to apply your financial planning knowledge to client situations. The 10-hour exam is divided into three separate sessions. Because of the integrated nature of financial planning, however, each session may cover all topic areas (personal financial planning, risk management, income taxes, investments, retirement planning, and estate planning). In addition to the education requirements, there is an experience requirement, which is

currently at least three years of qualifying full-time work experience in personal financial planning. There are additional requirements for candidates and registrants to pass Fitness Standards and a Background Check and to agree to abide by CFP Board's *Code of Ethics and Professional Responsibility*, *Rules of Conduct* and *Financial Planning Practice Standards*. Certificants must continue to meet continuing education requirements which presently include obtaining 30 hours of continuing education in selected subjects every two calendar years, including a two-hour CFP Ethics course. For more details, see [www.cfp.net](http://www.cfp.net).

Form ADV, Part 2B, Item 3

***Disciplinary Information***

Mr. McCaleb does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

***Other Business Activities***

Jason L. McCaleb may also work under the dba McCaleb Wealth Management. He is involved in rental properties.

Form ADV, Part 2B, Item 5

***Additional Compensation***

Jason L. McCaleb does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

***Supervision***

SharpePoint, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the Securities and Exchange Commission and Investment Advisers Act of 1940. Mr. McCaleb is supervised by SharpePoint, LLC's Chief Compliance Officer, Trey Vineyard, (480) 999-3033.

Form ADV, Part 2B, Item 7

***Requirements for State-Registered Advisers***

Jason L. McCaleb does not have any reportable disciplinary events required to be disclosed in this section.