

This brochure supplement provides information about Jeffrey Michael Jones that supplements the Heritage Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Jeffrey Michael Jones if you did not receive Heritage Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey Michael Jones is also available on the SEC's website at www.adviserinfo.sec.gov.

Heritage Wealth Management, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Jeffrey Michael Jones

Personal CRD Number: 5542768

Investment Adviser Representative

Heritage Wealth Management, LLC
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UPDATED: 1/22/2016

Item 2: Educational Background and Business Experience

Name: Jeffrey Michael Jones **Born:** 1982

Educational Background and Professional Designations:

Education:

Bachelor Business Finance, Arizona State University – 2007

Business Background:

10/2013 – Present	Financial Advisor Heritage Wealth Management, LLC
03/2012 – Present	Investment Advisor The Morgan Group
03/2006 – 03/2012	Licensed Banker Wells Fargo

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Jeffrey Michael Jones 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 commissionable products conflict with the fiduciary duties of a registered investment adviser. Heritage Wealth Management, LLC 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 utilize the services of any representative of Heritage Wealth Management, LLC in such individual's outside capacities.

Item 5: Additional Compensation

Other than salary, annual bonuses, or regular bonuses, Jeffrey Michael Jones does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Heritage Wealth Management, LLC.

Item 6: Supervision

As a representative of Heritage Wealth Management, LLC, Jeffrey Michael Jones works closely with Chief Compliance Officer, Keegan Healey, and all advice provided to clients is reviewed by this supervisor prior to implementation. Keegan Healey can be reached at (602) 569-9959. Jeffrey Michael Jones adheres to all required regulations regarding the activities of an Investment Adviser 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.