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**Jarvis Financial Services, Inc.**  
Form ADV Part 2B – Individual Disclosure Brochure

— *for* —

**Nathaniel Paul Jarvis**  
Personal CRD Number: 2295380  
Investment Adviser 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 Nathaniel, Investment Adviser Representative, 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](http://www.adviserinfo.sec.gov).

**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™

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, administered in 10 hours over a two-day period, 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** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- **Ethics** – Agree to be bound by CFP Board's *Standards of Professional 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:

- i. **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
- ii. **Ethics** – Renew an agreement to be bound by the Standards of Professional 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.

<i>Business Background</i>	08/1990 - Present	Financial Planner / Consultant Jarvis Financial Services, Inc.
	03/2013 - Present	Investment Adviser Representative Jarvis Financial Services, Inc.
	01/2018 - Present	Independent Consultant
	03/2006 - 09/2018	Registered Representative Crown Capital Securities
	03/2006 - 05/2013	Investment Adviser Representative

### *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**

Nathaniel is a registered representative and 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 adviser. 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 their capacity as a registered representative and licensed insurance agent. Nathaniel Paul Jarvis spends less than 5 hours per month on his outside business activities.

### *Item 5:*

### **ADDITIONAL COMPENSATION**

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 a representative of Jarvis Financial Services, Inc., Nathaniel works closely with the supervisor, Matthew P. Jarvis, and all advice provided to clients is reviewed by the supervisor prior to implementation. Nathaniel's contact information is on the cover page of this disclosure document.