



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



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

— *for* —

Matthew Paul Jarvis
Personal CRD Number: 4703256
Investment Adviser 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 Matthew, Managing Member, 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.

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 allows him to offer clients the best advice possible.

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, 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.

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 full-time 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.

<i>Business Background</i>	08/2003	– Present	Employee/Owner 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
	08/2003	– 03/2006	Registered Representative

Item 3:**DISCIPLINARY INFORMATION**

Matthew has no legal or disciplinary events to disclose.

Item 4:**OTHER BUSINESS ACTIVITIES**

Matthew 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 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 such individual's capacity as a registered representative and licensed insurance agent. Matthew spends approximately two hours per month on his outside business activities.

Matthew provides coaching and consulting to other financial advisers around the country through his involvement with The Perfect RIA. This does not create a conflict of interest with his role as an adviser.

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 adviser.

Item 5:**ADDITIONAL COMPENSATION**

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 representative 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 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.