

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**January 2022**

**Jason Blount**

**Cold Harbor Financial, Inc.**  
**8052 Elm Dr., Suite J-1**  
**Mechanicsville, Virginia 23111**  
**[www.ColdHarborFinancial.com](http://www.ColdHarborFinancial.com)**

**Firm Contact:**  
**Jason Blount**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Blount that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Blount if you did not receive Cold Harbor Financial, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Blount is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #2235348.

## Item 2: Educational Background & Business Experience

**Jason Blount**

**Year of Birth:** 1967

**Educational Background:**

- 1990: Longwood University; Bachelor of Science in Marketing

**Business Background:**

- 01/2022 – Present Cold Harbor Financial, Inc.; Owner & Chief Compliance Officer
- 02/2013 – 01/2022 Raymond James Financial Services Advisors, Inc.; Financial Advisor
- 05/1990 – 02/2013 Mutual Omaha Investor Services, Inc.; Financial Advisor

**Exams, Licenses & Other Professional Designations:**

- Month/2013: Series 7 Exam
- Month/2003: Series 65 Exam
- Month/1991: Series 6 Exam
- Month/1991: Series 63 Exam

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Mr. Blount.

## Item 4: Other Business Activities

Representatives of our firm are insurance agents/brokers. They offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest exists as these insurance sales create an incentive to recommend products based on the compensation adviser and/or our supervised persons may earn. To mitigate this potential conflict, our firm will act in the client's best interest.

**Financial Institution Consulting Services**

Mr. Blount provides investment consulting services to Brokerage Customers. Broker/dealers pay compensation to Cold Harbor Financial, Inc. for providing investment consulting services to Customers. This consulting arrangement does not include assuming discretionary authority over Brokerage Customers' brokerage accounts or the monitoring of securities. These consulting services offered to Brokerage Customers may include a general review of Brokerage Customers' investment holdings, which may or may not result in our firm's investment adviser representative making specific securities recommendations or offering general investment advice. Brokerage Customers will execute a written advisory agreement directly with our firm.

This relationship presents conflicts of interest. Potential conflicts are mitigated by Brokerage Customers consenting to receive investment consulting services from our firm; by our firm not accepting or billing for additional compensation on broker/dealers' Assets Under Management beyond the consulting fees disclosed in Item 5 of the Form ADV Part 2A in connection with the investment consulting services; and by our firm not engaging as, or holding itself out to the public as, a securities broker/dealer. Our firm is not affiliated with any broker/dealer.

### **Item 5: Additional Compensation**

Mr. Blount will receive up to \$10,000 in transition assistance from Charles Schwab & Co., Inc.

### **Item 6: Supervision**

Mr. Blount is the sole owner and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

### **Item 7: Requirements for State-Registered Advisers**

Mr. Blount has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.