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February 2025**



**David Bruce Morrison
(CRD #5463175)**

**Treasure Valley Financial Planning
3715 E. Overland Road, Ste. 205
Meridian, ID 83642**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Morrison that supplements Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning's brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Morrison is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

David Morrison

Year of Birth: 1979

Educational Background:

- 2005: Boise State University; Bachelors in Communication

Business Background:

- 08/2017 – Present Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning; Investment Adviser Representative
- 01/2011 – Present Morrison Asset Management; Managing Member
- 05/2009 – Present Idaho Brewing Company; Managing Member
- 11/2013 – 08/2017 Ameriprise Financial Services; Registered Representative
- 11/2007 – 11/2013 Waddell & Reed Inc.; Registered Representative

Exams, Licenses & Other Professional Designations:

- 2008: Series 66 & 7 Exam
- 2008: Life, Health, and Variable insurance licenses (AK, AZ, CA, FL, IA, ID, ME, MI, MN, MO, MT, NV, NY, NC, OR, UT, & WA)
- Certified Financial Planner (CFP®)

Certified Financial Planner (CFP®)

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information¹

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

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 4: Other Business Activities

Mr. Morrison is a licensed insurance agent/broker. He may offer insurance products and receive fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Morrison will act in the client's best interest.

Item 5: Additional Compensation

Mr. Morrison does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Morrison's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Morrison's brochure supplement at (360)308-8239.

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**Jonathan Tyler Belnap
(CRD #5598602)**

**Treasure Valley Financial Planning
3715 E. Overland Road, Ste. 205
Meridian, ID 83642**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Belnap that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Belnap is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Jonathan Tyler Belnap

Year of Birth: 1982

Educational Background:

- 2007: Boise State University; Bachelor of Arts in Communications
- 2004: Brigham Young University; Associate of Science

Business Background:

- 10/2018 – Present Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning; Investment Advisor Representative
- 06/2009 – 9/2018 Waddell & Reed; Financial Advisor
- 09/2008 – 05/2009 Wamu Investments; Financial Consultant

Exams, Licenses & Other Professional Designations:

- 2008: Series 6 & 63
- 2009: Series 65
- 2009: Idaho Disability (Health), Life, and Variable license holder
- 2013: Series 7

Item 3: Disciplinary Information²

There are no legal or disciplinary events material to your evaluation of Mr. Belnap.

Item 4: Other Business Activities

Mr. Belnap is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Belnap, as a fiduciary, will act in the client's best interest.

Item 5: Additional Compensation

Mr. Belnap does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Belnap's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Belnap's brochure supplement at (360)308-8239.

² Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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**Eugene Delarosa
(CRD #4909729)**

**Treasure Valley Financial Planning
3715 E. Overland Road, Ste. 205
Meridian, ID 83642**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Delarosa that supplements Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning's brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Delarosa is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Eugene Albert Delarosa

Year of Birth: 1961

Educational Background:

- 1983: Stanford University; Bachelor of Science in Chemical Engineering

Business Background:

- 01/2020 – Present Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning; Investment Adviser Representative
- 05/2009 – 01/2020 Ameriprise Financial; Financial Adviser
- 08/2006 – 05/2009 UBS; Financial Adviser
- 02/2005 – 08/2006 Piper Jaffray; Financial Adviser

Exams, Licenses & Other Professional Designations:

- 2018: Securities Industry Essentials (SIE)
- 2008: Certified Financial Planner (CFP®)
- 2017: Accredited Portfolio Management Advisor (APMA®)
- 2005: Series 7 & 66 Exams

Accredited Portfolio Management Advisor (APMA®):

Individuals who hold the APMA® designation have completed a course of study encompassing client assessment and suitability, risk/return, investment objectives, bond and equity portfolios, modern portfolio theory and investor psychology. Students have hands-on practice in analyzing investment policy statements, building portfolios, and making asset allocation decisions including sell, hold, and buy decisions within a client's portfolio. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to *Standards of Professional Conduct* and are subject to a disciplinary process. Designees renew their designation every 2 years by completing 16 hours of continuing education, reaffirming adherence to the *Standards of Professional Conduct* and complying with self-disclosure requirements.

Certified Financial Planner (CFP®)

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information³

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

Item 4: Other Business Activities

Mr. Delarosa has no other business activities to disclose.

Item 5: Additional Compensation

Mr. Delarosa does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Delarosa's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Delarosa's brochure supplement at (360)308-8239.

³ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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**Patrick D Collins
(CRD # 5728681)**

**Treasure Valley Financial Planning
3715 E. Overland Road, Ste. 205
Meridian, ID 83642**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Collins that supplements Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning's brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Collins is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Patrick D Collins

Year of Birth: 1965

Educational Background:

- 1989: The American Graduate School of International Management; MBA (known currently as Thunderbird School of Global Management, Arizona State University)
- 1987: University of Idaho; Bachelor's in Foreign Language/Business Option

Business Background:

- 08/2017 – Present Clear Creek Financial Management, LLC Treasure Valley
Financial Planning; Investment Adviser Representative
- 07/2011 – Present Ortigara LLC; Managing Member
- 09/2013 – 08/2017 Ameriprise Financial Services; Registered Representative
- 10/2009 – 09/2013 Waddell & Reed Inc.; Registered Representative
- 12/2008 – 07/2010 Global Trade & Consulting Services, LLC; Managing Member
- 08/2009 – 05/2010 Boise State University; Adjunct Professor
- 01/1990 – 12/2008 Micron Technology, Inc.; Regulatory Compliance Administrator

Exams, Licenses & Other Professional Designations:

- 2010: Series 66 & 7 Exams
- 2010: ID Life, Health, and Variable insurance licenses
- Chartered Retirement Planning Counselor (CRPC®)
- Accredited Portfolio Management Advisor (APMA®)

Chartered Retirement Planning Counselor (CRPC®)

The CRPC® is offered by The College for Financial Planning®. The CRPC® Program focuses on the pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning CounselorSM and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period. Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

Accredited Portfolio Management Advisor (APMA®):

Individuals who hold the APMA® designation have completed a course of study encompassing client assessment and suitability, risk/return, investment objectives, bond and equity portfolios, modern portfolio theory and investor psychology. Students have hands-on practice in analyzing investment policy statements, building portfolios, and making asset allocation decisions including sell, hold, and buy decisions within a client's portfolio. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to *Standards of Professional Conduct* and are subject to a disciplinary process. Designees renew their designation every 2 years by completing 16 hours of continuing education, reaffirming adherence to the *Standards of Professional Conduct* and complying with self-disclosure requirements.

Item 3: Disciplinary Information⁴

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

Item 4: Other Business Activities

Mr. Collins is a licensed insurance agent/broker. He may offer insurance products and receive fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Collins will act in the client's best interest.

Item 5: Additional Compensation

Mr. Collins does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Collins' activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Collins' brochure supplement at (360) 308-8239.

⁴ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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**Kendell Wesley Frye
(CRD # 7413418)**

**Clear Creek Financial Management, LLC
9361 Bayshore Drive NW
Silverdale, WA 98383**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Frye that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive Clear Creek Financial Management's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Frye is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Kendell Wesley Frye

Year of Birth: 1995

Educational Background:

- 2020: Cal State Fullerton; Bachelor's Degree in Business/Financial Planning
- 2018: Riverside City College; Associate of Arts in Business Administration & Psychology

Business Background:

- 05/2024 – 07/2024 Clear Creek Financial Management, LLC;
Investment Adviser Representative
- 08/2019 – 07/2024 Falcon Wealth Planning; Advisor
- 06/2019 – 08/2019 Pacific Advisors; Intern
- 02/2018 – 08/2019 Honda Motor Company; Office Associate

Exams, Licenses & Other Professional Designations:

- 2021: Certified Financial Planner™, CFP®

CERTIFIED FINANCIAL PLANNER™, CFP®

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information⁵

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

Item 4: Other Business Activities

Mr. Frye does not have any outside business activities to report.

⁵ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 5: Additional Compensation

Mr. Frye does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Frye's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Frye's brochure supplement at (360) 308-8239.

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**Justin Dillan Egbert
(CRD # 7747032)**

**Treasure Valley Financial Planning
3715 E. Overland Road, Ste. 205
Meridian, ID 83642**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Egbert that supplements Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning's brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Egbert is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Justin Egbert

Year of Birth: 1999

Educational Background:

- 2022: Brigham Young University; Bachelors of Science in Business Finance

Business Background:

- 01/2023 – Present Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning; Associate Advisor
- 06/2020 – 12/2022 Freeman Clothing Co.; General Manager
- 03/2020 – 06/2020 Walmart; Associate
- 07/2018 – 03/2020 LSD Church; Religious Sabbatical
- 07/2017 – 07/2018 Freeman Clothing Co.; Sales Associate
- 07/2015 – 07/2017 Let Us Clip Ya; Landscaper

Exams, Licenses & Other Professional Designations:

- 2024: Certified Financial Planner™, CFP®
- 2023: Series 65

CERTIFIED FINANCIAL PLANNER™, CFP®

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 high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 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, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP® Board's *Standards of Professional Conduct*.

Individuals who become certified must 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 industry and 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.

Item 3: Disciplinary Information⁶

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

Item 4: Other Business Activities

Mr. Egbert is an owner and agent of More Than Suits, LLC, which is a men's retail business. Mr. Egbert spends approximately 20 hours per month on this business activity.

Item 5: Additional Compensation

Mr. Egbert does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Egbert's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Egbert's brochure supplement at (360)308-8239.

⁶ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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**Matthew Cannon Jones
(CRD # 7985397)**

**Clear Creek Financial Management, LLC
9361 Bayshore Drive NW
Silverdale, WA 98383**

**Firm Contact:
Joseph Gates
Chief Compliance Officer**

**Firm Website Address:
www.ClearCreekFM.com**

This brochure supplement provides information about Mr. Jones that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive Clear Creek Financial Management's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Jones is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Matthew Cannon Jones

Year of Birth: 2002

Educational Background:

- 2024: Utah State University; Bachelor of Science in Finance

Business Background:

- 09/2024 – Present Clear Creek Financial Management, LLC; Investment Adviser Representative
- 05/2024-09/2024 Treasure Valley Financial Planning; Advisor Assistant
- 08/2023 – 05/2024 SpringSource Wealth Advisors; Paraplanner
- 01/2024 – 03/2024 Adams Wealth Advisors; Financial Planner
- 01/2021 – 05/2024 Utah State University; Student
- 06/2020 – 01/2021 Church of Jesus Christ of Latter-Day Saints; Volunteer Missionary
- 05/2019 – 06/2020 Daybreak Head; Lifeguard

Exams, Licenses & Other Professional Designations:

- 2023: Series 65 Exam

Item 3: Disciplinary Information⁷

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

Item 4: Other Business Activities

Mr. Jones does not have any outside business activities to report.

Item 5: Additional Compensation

Mr. Jones does not receive any other economic benefit for providing advisory services in addition to advisory fees.

⁷ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Jones's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Jones's brochure supplement at (360) 308-8239.