

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
February 2021**

**Shannon Crowder Jones, CFA<sup>®</sup>, CFP<sup>®</sup>**



**760 SW 9th Avenue, Suite 2350  
Portland, OR 97205**

**Firm Contact:  
Kevin Sanger  
Chief Compliance Officer**

This brochure supplement provides information about Ms. Jones that supplements our brochure. You should have received a copy of that brochure. Please contact Kevin Sanger if you did not receive JGP Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Jones is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #5491774.

## Item 2: Educational Background & Business Experience

**Shannon Crowder Jones**

**Year of Birth:** 1984

### **Educational Background:**

- 2013: Florida State University; Master of Business Administration
- 2007: Florida State University; Bachelor of Science in Finance

### **Business Background:**

- 08/2018 – Present JGP Wealth Management, LLC; Portfolio Manager and Financial Planning Consultant
- 07/2012 – 07/2018 BNY Mellon Wealth Management; Associate Wealth Manager
- 04/2010 – 04/2012 Fidelity Investments; Trading Representative
- 09/2005 – 04/2010 Bank of America; Teller

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

- 08/2018: Chartered Financial Analyst (CFA®)
- 04/2020: Certified Financial Planner™ (CFP®)

### **Chartered Financial Analyst (CFA®)**

The CFA® charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA® Institute — the largest global association of investment professionals. To earn the CFA® charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA® Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA® Institute Code of Ethics and Standards of Professional Conduct. The CFA® Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession. To learn more about the CFA® charter, visit [www.CFAinstitute.org](http://www.CFAinstitute.org).

### **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 Information<sup>1</sup>**

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

### **Item 4: Other Business Activities**

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

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

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

### **Item 6: Supervision**

Kevin Sanger supervises and monitors Ms. Jones's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Sanger if you have any questions about Ms. Jones's brochure supplement at 503-446-6450.

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<sup>1</sup> 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.