

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
January 2018**

**Joseph P. Gross**



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

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

This brochure supplement provides information about Mr. Gross 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 Mr. Gross is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #2322360.

## Item 2: Educational Background & Business Experience

**Joseph P. Gross**  
**Year of Birth:** 1968

### **Educational Background:**

- 1990: University of Arizona; Bachelor of Science in Finance

### **Business Background:**

- 01/2018 – Present JGP Wealth Management, LLC; Investment Adviser Representative
- 10/2001 – 01/2018 Wells Fargo Advisors; Managing Director of Investments & Financial Advisor
- 04/1993 – 11/2001 Merrill Lynch, Pierce, Fenner, Smith, Inc; Financial Advisor

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

- 2001: Series 31 Exam
- 1994: Series 65 Exam
- 1993: Series 7 & 63 Exams
- Insurance Licensed

## Item 3: Disciplinary Information<sup>1</sup>

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

## Item 4: Other Business Activities

Mr. Gross 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. Gross, as a fiduciary, will act in the client's best interest.

## Item 5: Additional Compensation

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

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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.

## **Item 6: Supervision**

Kevin Sanger supervises and monitors Mr. Gross' 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 Mr. Gross' brochure supplement at 503-446-6450.