

**Kaleb K. Jones, CFP®**  
CRD # 6077065

## **Lifestyle Asset Management, Inc.**

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### **FORM ADV PART 2B BROCHURE SUPPLEMENT**

This brochure supplement provides information about Kaleb K. Jones that supplements the Lifestyle Asset Management, Inc. brochure. You should have received a copy of that brochure. Please contact 281-612-2035 if you did not receive Lifestyle Asset Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Kaleb K. Jones is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Kaleb K. Jones**

**Year of Birth:** 1989

### **Formal Education After High School:**

- Texas Tech University, BBA, Personal Financial Planning, 2012

### **Designation**

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

**Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials

**Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

**Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

**Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

**Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

#### **Business Background:**

- Lifestyle Asset Management, Inc., Investment Advisor Representative, 6/2018 - Present
- First Allied Advisory Services, Inc., Investment Adviser Representative, 1/2015 - Present
- First Allied Securities, Inc., Registered Sales Assistant, 4/2012 - Present

### **Item 3 Disciplinary Information**

Mr. Jones does not have any reportable disciplinary disclosure.

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

Kaleb K. Jones is an Investment Adviser Representative of First Allied Advisory Services, Inc. dba Lifestyle Financial Advisors, Inc., a registered investment adviser ("Lifestyle"). When appropriate, Mr. Jones may recommend that you use the investment advisory services of Lifestyle. If you utilize the advisory services of Mr. Jones through Lifestyle, he may receive additional fees or other compensation in his capacity as an investment adviser representative. These fees would be in addition to any fees charged for the advisory services provided through Lifestyle Asset Management, Inc.

### **Item 5 Additional Compensation**

Refer to the *Other Business Activities* section above for disclosures on Mr. Jones 's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Lifestyle Asset Management, Inc.'s firm brochure for additional disclosures on this topic.

### **Item 6 Supervision**

Paul Brian Jackson, Chief Compliance Officer of Lifestyle Asset Management, Inc. is responsible for supervising the advisory activities of Mr. Jones. You may contact Mr. Jackson at 281-612-2035.