

Item 1. Cover Page – Part 2B of Form ADV: *Brochure Supplement*



Gary Jeweler, CFP[®], CPA
ADV Part 2B: Brochure Supplement
CRD #3010702

March 2021

This brochure supplement provides information about Gary Jeweler that supplements the Jeweler and Associates, LLC dba Evolve Financial brochure. You should have received a copy of that brochure. Please contact us at 206 794-1061 if you did not receive that brochure or if you have any questions about the contents of this supplement. Additional information about Gary is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Gary Jeweler

Year of Birth: 1961

Educational Background

Boston College, Accounting 1983

University of Virginia, Medical degree 1992

Business Background

06/2020 – Present Evolve Financial, Managing Member

08/2017 – 04/2019 Cambridge Investment Research Advisors, Inc., Investment Advisor Representative

08/2017 – 04/2019 Cambridge Investment Research, Inc., Registered Representative

06/2016 – 12/2016 Ameriprise Financial Services Inc., Registered Representative, Investment Advisor Representative

08/2013 – 06/2016 Cambridge Investment Research, Inc., Registered Representative

08/2013 – 06/2016 Cambridge Investment Research Advisors, Inc., Investment Advisor Representative

Designations

Certified Public Accountant 1998

The state of Washington requires the following in order to earn and maintain the CPA designation:

1. A bachelor's degree or higher with at least 150 hours including at least 24 semesters hours in accounting with at least 15 of those hours at the upper-level or graduate level.
2. At least 24 hours of business administration classwork.
3. Obtain accounting experience no more than 8 years before taking the CPA exam and must work in either public, industry, or government accounting with all work verified by a licensed CPA.
4. Pass the Uniform CPA Examination® with a score of 90% or better as well as taking the 8 hour CPA ethics course.
5. Complete 120 hours of CPE every 3 years including at least 4 hours of Washington-specific Ethics and no more than 60 hours of Non-Technical courses.

Certified Financial Planner™ 2002

All CFP® professionals must pass a CFP-board registered program or hold one of seven advanced degrees, designations, or professional licenses and pass the CFP exam. Prerequisites include a bachelor's degree (or higher) from an accredited college or university and three full years of full-time personal financial planning experience. Thirty hours of continuing education must be completed every two years. Areas of study include insurance and estate planning, employee benefit and tax planning, as well as investment and retirement planning. Holders of the CERTIFIED FINANCIAL PLANNER™ designation are also subject to strict adherence to the CFP Board's Financial Planning Practice Standards and Professional Code of Ethics and Responsibility.

Item 3. Disciplinary Information

Evolve Financial is required to disclose any material facts regarding any legal or disciplinary actions that would be material to your evaluation of Mr. Jeweler. No events have occurred that are applicable to this item.

Item 4. Other Business Activities

Evolve Financial is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Mr. Jeweler is a licensed insurance agent. As such, he receives typical and customary commissions for the sale of insurance products. On average, Mr. Jeweler spends approximately 1% of his time on this activity. This presents a conflict in that he has an incentive to recommend insurance products to clients of Evolve. Clients are under no obligation to follow recommendations made or to purchase insurance products through Mr. Jeweler.

Mr. Jeweler is also a Certified Public Accountant. From time to time he will offer clients advice or services from this outside activity, which represents a conflict of interest. As a fiduciary, however, Evolve always acts in the best interests of the client. Clients are not required to use the CPA services of Mr. Jeweler and are free to seek these services through professionals unaffiliated with Evolve. Typically, Mr. Jeweler provides tax preparation services only on an as requested basis. During tax season (generally March 1 – April 15) he will spend approximately 10% of his time on this activity, none of which is during trading hours.

Item 5. Additional Compensation

Mr. Jeweler does not receive any economic benefit from any non-client for providing advisory services.

Item 6. Supervision

Evolve is one-person financial advisory firm, consequently, Mr. Jeweler alone supervises his advisory activities. Because of our size, traditional internal control and oversight structures are not viable because a separation of duties among different people is not possible. We maintain records that are intended to demonstrate our compliance with securities laws, rules and our policies.

Item 7 - Requirements for State-Registered Advisers

Mr. Jeweler has not been involved in: (a) any arbitration claim alleging damages in excess of \$2,500 resulting in an award or being found liable; (b) any civil, self-regulatory organization, or administrative proceeding resulting in an award or being found liable; or (c) a bankruptcy petition.