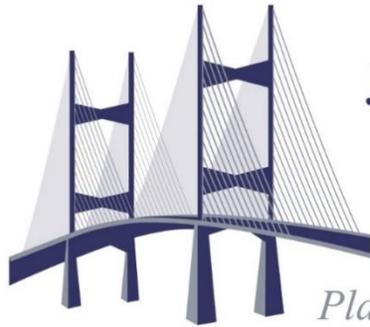


*This brochure supplement provides information about Lester Edgar Hockenbery that supplements the Jacksonville Wealth Management brochure. You should have received a copy of that brochure. Please contact Lester Edgar Hockenbery if you did not receive Jacksonville Wealth Management's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Lester Edgar Hockenbery is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*



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## **Jacksonville Wealth Management**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Lester Edgar Hockenbery**

Personal CRD Number: 857052

Investment Adviser Representative

Jacksonville Wealth Management  
8075 Gate Parkway West  
Jacksonville, FL 32216  
(904) 378-6615  
[tom@jaxwealth.com](mailto:tom@jaxwealth.com)

UPDATED: 11/16/2020

## Item 2: Educational Background and Business Experience

**Name:** Lester Edgar Hockenbery                      **Born:** 1951

### **Educational Background and Professional Designations:**

#### **Education:**

Lester Edgar Hockenbery has not received any higher education degrees after high school.

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) 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:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education - 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 planning field; and
- ii. Ethics - 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

11/2017 - Present	Investment Advisor Representative Jacksonville Wealth Management
11/2017 - Present	IAR Private Advisors Group
11/2017 - Present	Registered Representative LPL Financial LLC
06/1998 - 11/2017	Insurance Agent Independent Planning Service
07/2011 - 11/2017	Registered Representative SA Stone Wealth Management Inc
09/2007 - 07/2011	IAR Securities America Advisors Inc

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

Lester Edgar Hockenbery is not engaged in any investment-related business or occupation (other than this advisory firm).

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

In connection with the transition of Lester Edgar Hockenbery's clients to the LPL Financial custodial platform and Lester Edgar Hockenbery's association as a registered representative of LPL Financial, Lester Edgar Hockenbery received financial transition support from LPL Financial in the form of a 3-year forgivable loan that may be forgiven over time depending on the length of his tenure with LPL Financial.

We encourage you to discuss any such conflicts of interest with your representative before making a decision to custody your assets at LPL Financial.

The payment(s) Lester Edgar Hockenbery received is/are in addition to the production bonuses, stock options and other economic benefits that he is entitled to receive as a registered representative of LPL Financial. The amount of these payments are significant in relation to the overall revenue earned or compensation received by Lester Edgar Hockenbery at his prior firm. Such payments are generally based on the size of the representative's business established at his prior firm and/or assets expected to be under custody on the LPL Financial platform. As a result, Lester Edgar Hockenbery has a financial incentive to recommend that clients establish an account with LPL Financial. This financial incentive creates a conflict of interest in connection with Lester Edgar Hockenbery's recommendation of LPL Financial.

#### **Item 6: Supervision**

As a representative of Jacksonville Wealth Management, Lester Edgar Hockenbery is supervised by Daniel Martin Ciez, the firm's Chief Compliance Officer. Daniel Martin Ciez is responsible for ensuring that Lester Edgar Hockenbery adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Daniel Martin Ciez is (904) 923-7526.