

**Item 1: Cover Sheet**

**Jordan R. Arnold, CFP®**

**ONEASCENT FINANCIAL SERVICES LLC**

D/B/A  
STRATEGENCE CAPITAL

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**This Brochure Supplement provides information about Jordan R. Arnold that supplements the OneAscent Financial Services, LLC Brochure. You should have received a copy of that Brochure. Please contact TJ Claud at the number above if you did not receive OneAscent Financial Services, LLC Brochure or if you have any questions about the contents of this supplement. Registration does not imply any certain level of skill or training.**

**Additional information about Jordan R. Arnold is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 2: Educational Background and Business Experience**

**Jordan R. Arnold**

**Born: 1992**

**EDUCATION:**

Indiana Wesleyan University  
B.S., Finance, 2013

**BUSINESS EXPERIENCE:**

OneAscent Financial Services, LLC	Investment Adviser Representative	2023-Present
Gateway Wealth Partners, LLC	Investment Adviser Representative	2022-2023
LPL Financial LLC	Registered Representative	2019-2023
Advisors' Pride Inc.	Investment Adviser Representative	2020-2022
First Bank of Berne	Credit Department Manager	2017-2019
iAB Financial Bank	Business Banking Officer	2015-2017
iAB Financial Bank	Credit Analyst	2014-2015
American Family Insurance	Licensed Sales Representative	2013-2014

**PROFESSIONAL DESIGNATIONS:**

**CERTIFIED FINANCIAL PLANNER™ (CFP®)**

\*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. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

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, administered in 10 hours over a two-day period, 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:

- 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
- 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.

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

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item for Mr. Arnold.

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

Certain professionals of OneAscent are separately licensed as independent insurance agents. As such, these professionals may conduct insurance product transactions for OneAscent clients, in their capacity as licensed insurance agents, and will receive customary commissions for these transactions in addition to any compensation received in his capacity as employees of OneAscent. Commissions from the sale of insurance products will not be used to offset or as a credit against advisory fees. These professionals, therefore, have incentive to recommend insurance products based on the compensation to be received, rather than on a client’s needs. The receipt of additional fees for insurance commissions is therefore a conflict of interest, and clients should be aware of this conflict when considering whether to engage OneAscent or utilize these professionals to implement any insurance recommendations. OneAscent

attempts to mitigate this conflict of interest by disclosing the conflict to clients, and informing the clients that they are always free to purchase insurance products through other agents that are not affiliated with OneAscent, or to determine not to purchase the insurance product at all. OneAscent also attempts to mitigate the conflict of interest by requiring employees to acknowledge in the firm's Code of Ethics, their individual fiduciary duty to the clients of OneAscent, which requires that employees put the interests of clients ahead of their own.

**Item 5:           Additional Compensation**

Please see response to Item 4 above.

**Item 6:           Supervision**

Harry Pearson, an owner of OneAscent, is responsible for all supervision and formulation and monitoring of investment advice offered to clients under his and IAR's supervision. Additional monitoring is done by the Firm's CCO, TJ Claud, to verify policies and procedures are being followed. All of these persons may be reached at (205) 847-1343.