



*People before profits*

## Brochure Supplement (Form ADV, Part 2B)

**Barry Kenneth Jamieson**

**5940 Clyde Moore Dr, Suite C Groveport, OH 43125**

**(614) 441-9605**

**rebel Financial LLC**

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### Item 1: Cover Page

This brochure supplement provides information about Barry Kenneth Jamieson that supplements the rebel Financial LLC brochure. You should have received a copy of that brochure. Please contact W. Phil Ratcliff if you did not receive the rebel Financial LLC brochure or if you have any questions about the contents of this supplement.

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



March 25, 2022

# Item 2: Educational Background & Business Experience

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## Name, Age (Year of Birth)

Barry Kenneth Jamieson, 61 (1963)

## Formal Education

MA Economics, Ohio State - 1986

BA, The Ohio State University - 1984

## Business Background

rebel Financial LLC, Investment Advisor Representative, 2022 - Present

CMP Financial Planning, Financial Planner, 2014-2022

Senior Program Manager, Ohio State University, 2007-2015

## Description of Professional Designations

Mr. Jamieson is a Certified Financial Planner (CFP)

### **Certified Financial Planner™ (CFP)® (2016)**

Issued by: Certified Financial Planner Board of Standards, Inc. located in Washington, DC

Prerequisites/Experience/Education Required: Candidate must complete a CFP Board registered program, or hold one of the following: Certified Public Accountant (CPA), Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU), Chartered Financial Analyst (CFA), Ph.D. in business or economics, Doctor of Business Administration, or Attorney's License. A candidate must also pass the (CFP)® Certification Examination, meet the work experience requirements (3 years work experience as defined by the CFP Board) comply with the CFP Board's *Code of Ethics and Professional Responsibility (Code of Ethics), Rules of Conduct or Financial Planning Practice Standards (Practice Standards)*. Applicants must agree to abide by the Standards of Professional Conduct. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Successful candidates receive a certificate and may use the designation on correspondence and business cards.

Continued use of the CFP® designation is subject to ongoing renewal requirements. To continue using the CFP® designation, 1) an individual must pay an annual certification fee of \$325.00, 2) must complete 30 hours of continuing education every two years and report continuing education to the Certified Financial Planner Board of Standards, Inc., 3) complete to

renew the CFP® certification. The renewal process involves completing a statement disclosing any investigations or legal proceedings relating to professional or business conduct.

## Item 3: Disciplinary Information

### Legal or Disciplinary Events

No information is applicable for this item for Mr. Jamieson.

### Criminal or Civil Action

There is no material information that is applicable for this item for Mr. Jamieson.

### Administrative Proceeding

No information is applicable for this item for Mr. Jamieson.

### Self-Regulatory Organization Proceeding

No information is applicable for this item for Mr. Jamieson.

### Other Proceeding

No information is applicable for this item for Mr. Jamieson.

## Item 4: Other Business Activities

### Investment-related Activities

Mr. Jamieson does not have any other investment-related activities.

### Other Business or Occupation for Compensation

Mr. Jamieson has no other business or occupation for compensation other than those previously disclosed.

## Item 5: Additional Compensation

### Economic Benefit

Mr. Jamieson will occasionally attend training, lunches, continuing education and seminars hosted by investment companies with non-cash compensation/gifts of less than \$100.

## Item 6: Supervision

### Describe Supervision

For activities of rebel Financial LLC, Mr. Jamieson is directly supervised by W. Phil Ratcliff. Mr. Ratcliff monitors his advice in an effort to ensure investments are suitable for his individual clients and consistent with their individual needs, goals, investment objectives and risk tolerance. Mr. Ratcliff also reviews Mr. Jamieson's activities to ensure compliance with the rebel Financial, LLC. Code of Ethics

### Name, Title and Telephone Number of Supervisor

W. Phil Ratcliff, President, (614) 441-9605

## Item 7: Requirements for State- Registered Advisers

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### Additional Information Regarding Disciplinary Events

There are no additional material facts to disclose regarding disciplinary events for Mr. Jamieson.

### Bankruptcy

No information is applicable for this item for Mr. Jamieson.