

BROCHURE

Jones Wealth Management, LLC

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October 23, 2019

This Brochure provides you with information about the qualifications and business practices of Jones Wealth Management LLC. It contains information that you should consider before becoming a client of our firm.

The information contained herein has not been approved or verified by any governmental authority. Our firm is a state registered Investment Adviser Firm, registered pursuant to the laws of the State of Tennessee. Registration of an Investment Adviser does not imply a certain level of skill or training, only that we have filed the appropriate registration documents in the proper jurisdictions and with the respective governmental entities.

Additional information about Jones Wealth Management can be found on the Investment Adviser Public Disclosure Website at www.adviserinfo.sec.gov. Jones Wealth Management' CRD/IARD No. is 156953.

The Brochure Supplement for the investment adviser representative of our firm begins after page 13 of this document. This document is not complete without the Brochure Supplement.

MATERIAL CHANGES (Item 2)

This version of our Brochure dated October 23, 2019 is an Other-Than-Annual-Amendment.

The amendments include:

The addition of Foundations Investment Advisor, LLC as a third-party money manager.

Orion Portfolio Solutions being added as a third-party money manager due to the acquisition of FTJ Fund Choice, LLC .

The deletion of The Pacific Financial Group, Inc as a third-party money manager.

Full Brochure is Available

If you have any questions, or would like a full copy of our Brochure, please contact us by phone at 423-438-0188 or by email to brian@joneswealthmanagementllc.com.

Additional information about Jones Wealth Management can be found on the Investment Adviser Public Disclosure Website at www.adviserinfo.sec.gov. Jones Wealth Management' CRD/IARD No. is 156953.

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ADVISORY SERVICES (Item 4)

About Our Business

Jones Wealth Management, LLC (hereinafter, “Jones Wealth Management” or the “Firm”) is an investment advisory firm that offers financial planning and consultation services, investment management services, and recommends third party asset management programs. Jones Wealth Management is a Tennessee limited liability company that was founded in October of 2011. Our firm’s managing principal is Brian K. Jones. Mr. Jones is the Chief Compliance Officer and sole Investment Advisor Representative for our firm.

Types of Advisory Services

Our firm provides financial advisory services to Individuals, High Net-worth Individuals, Corporations or Other Business entities. We assist clients in growing their investments and planning for their financial future. An explanation of our services is as follows:

1. Financial Planning & Consultation Services

We may prepare comprehensive financial plans to assist clients in reaching their financial and retirement goals. Our firm also provides consultations and develops plans by evaluating data relative to a client’s personal financial profile, investment objectives and goals, risk tolerance, and tax status. Our financial plan may include information regarding retirement planning, advanced education planning, college planning, plans for major purchases, life and disability insurance needs, long-term care needs, and simple estate planning issues. The formulated plan does not include information or analysis with respect to tax liabilities or risks.

2. Third Party Asset Management Services

We also analyze, select, and recommend advisory platforms of other investment advisors with managed strategies to meet the investment needs of our clients. These third-party managers are institutional advisors who offer these programs through other investment advisors. Jones Wealth Management monitors the third-party money managers’ strategies to ensure that its objectives remain aligned with the investment objectives and risk tolerance of our clients. These third-party money managers are granted discretionary authority to manage client assets. We are responsible for providing continual monitoring of our client’s securities holdings contained by these platforms. We currently offer Third Party Asset Management Services through the following platforms:

Envestnet Asset Management, Inc. (Envestnet)

Envestnet offers separately managed accounts, strategic third-party portfolios, and proprietary fund strategies to meet specific investment goals and objectives.

Orion Portfolio Solutions

Orion’s program encompasses the use of analytical scenarios to create model portfolios using a combination of investment strategies and asset class blends.

FormulaFolio Investments, LLC (Formula Folio)

Formula Folio portfolios offer custom asset allocations using proprietary models to identify opportunities in equities, mutual funds, and exchange traded funds (ETFs).

Foundations Investment Advisors, LLC

Foundation’s diverse lineup of investment portfolios include tactically managed portfolios, portfolios that are managed based on a proprietary algorithm, passively managed portfolios and portfolios with traditional stocks and bonds.

More details regarding the specific strategies of the foregoing third party money managers are fully described in each respective disclosure Brochure (Form ADV 2A). Please note that Jones Wealth Management may utilize additional third-party asset management programs.

3. Investment Management Services

Our non-discretionary investment management or supervisory services consist of supervising investment assets, passive investments, asset allocation, as well as access to other investment services to meet your investment goals and objectives. Our advice regarding financial securities encompasses mutual funds, exchange traded funds (ETFs), brokered certificates of deposits, and U.S. Government Securities.

Tailored Services

Our advice and services are based on the individual needs of our clients, after analyzing and thoroughly evaluating your goals, objectives, investment horizon, and risk tolerance. Clients may impose restrictions on investing in certain asset classes or any specific types of securities by advising their investment advisor representative of such restrictions.

Wrap Fee Programs

Jones Wealth Management is not a sponsor of, or participant in, any Wrap Fee Program(s).

Assets under Management

Our firm does not manage clients' assets or investments portfolios but may do so upon client request. Our core services are recommendation of third-party asset management services, financial planning advice/consultation, and non-discretionary investment supervisory services. Consequently, we do not have any client assets under management (as defined by regulations) to report.

FEES AND COMPENSATION (Item 5)**Advisory Fees**

Jones Wealth Management earns its fees and compensation by selecting and recommending third party asset management programs. Our fees for services are as follows:

1. Financial Planning & Consultation Fees

Depending on the needs of a client Jones Wealth Management may assist in the creation of a financial plan. The Firm does not charge a separate fee for this service.

2. Third Party Asset Management Fees

Depending on the program, Clients pay the third-party money managers the program fees including the advisory fees, as disclosed in the advisory agreements and Brochure (Form ADV Part 2A) for services performed in connection with the third-party money manager's products or services. The fees for discretionary asset management services are negotiable, but the collective fee generally ranges from 2.75% to .25% per annum; this per annum amount includes the fees to Jones Wealth Management.

The final fee is determined in conjunction with the program selected, the size of the account, and the services covered. The final fee and other charges exclusive of fees such as, brokerage, clearance, custody, and administrative services will be fully disclosed in the third-party money manager's disclosure documents and investment management agreement. If Jones Wealth Management is to receive referral fees from the third-party money managers, clients must acknowledge such compensation arrangement by signing the solicitor's disclosure and acknowledgement. There are no additional fees charged to clients due to solicitor's agreements.

Clients are encouraged to obtain and carefully review the contracts and disclosure documents, including Form ADV Part 2A, of each third-party money manager so as to understand fully the applicable services and fee assessments. The services, fees, reports, and contract termination provisions provided by these programs vary, as do the associated costs. We encourage our clients to compare programs.

3. Investment Management Fees

Although we supervise some investments for clients, due to the type of investments (mostly passive), we are not currently assessing fees for this investment management or supervisory services. Nonetheless, we will provide thirty (30) days written notification prior to any fee initiation or increase.

Billing Procedures

The billing procedures for Jones Wealth Management are as follows:

1. Financial Planning Services

Currently, there is no fee assessment for financial planning services.

2. Third Party Asset Management Services

Advisory fees are billed in accordance with the third-party money manager's fee structure. Typically, those fees are payable monthly in arrears. Generally, the collective fee is deducted directly from the client's accounts pursuant to written authorization incorporated into the third-party money manager's management agreement. Correspondingly, the third-party money manager will pay Jones Wealth Management its portion from the collective fee deduction. There are no additional fees charged by Jones Wealth Management. Generally, the advisory fees are calculated based on the value of all the assets in the account, although each third-party manager may calculate its fee based on the value of those assets in the client's account for which manager provided services for the preceding calendar quarter. The collective fee assessment is described in the investment management agreement or alternatively in an attachment to our investment advisory agreement.

3. Investment Management Services

Currently, there are no fee assessments for this service.

Other Fees & Expenses

Depending on the type of investments, clients will also incur additional fees and expenses related to management of investments and advisory service provisions. These fees may include, but are not limited to no-load or non-network mutual fund ticket charges, brokerage transaction costs, deferred sales charges on previously purchased mutual funds, account maintenance fees, clearing costs, and other legal or transfer fees. The broker-dealers, mutual fund companies, and other custodians who provide services for your account charge these fees ("third-party fees") and clients are responsible for payment of all third-party fees and expenses. It is important to note that the advisory fees paid to Jones Wealth Management are separate and distinct from the maintenance fees and transaction expenses charged by these third-parties. Please refer to *Brokerage Practices* section (Item 12), for more information regarding our brokerage custodian.

Refund Policy

Clients who do not receive this Brochure at least 48 hours in advance of signing our advisory agreement are afforded the right to terminate their agreement within five (5) days, without penalty. Upon expiration of the five (5) day period, either party may terminate the advisory agreement by providing thirty (30) days written notice. In the event of termination, any prepaid, unearned fees will be assessed pro-rata and refunded promptly, and any earned, unpaid fees due to Jones Wealth Management will be collected prior to disbursement of funds. In the event Firm is unable to deduct final fees from account, the Firm will transmit an invoice to client, which is due upon client's receipt.

Other Compensation

Neither Jones Wealth Management nor its investment advisor representative accepts any compensation for the sale of securities or other investment products, including asset-based sales charges or services fees from the sale of mutual funds. The investment advisor representative of the Firm is not registered in any investment sales capacity.

PERFORMANCE BASED FEES AND SIDE-BY-SIDE MANAGEMENT (Item 6)

Jones Wealth Management does not charge performance-based fees and we do not conduct side-by-side investment management services.

TYPES OF CLIENTS (Item 7)

Jones Wealth Management supervises investments for many different types of clients. We generally provide advice to individuals, high net-worth individuals, corporations, or other business entities.

Depending on the advisory program, there may be a minimum accounts investment value. The account minimum may also be waived based on other criteria and at the sole discretion of the firm.

METHODS OF ANALYSIS, INVESTMENT STRATEGIES, AND RISK OF LOSS (Item 8)

Methods of Analysis and Investment Strategies

Jones Wealth Management generally utilizes fundamental analysis to analyze third party asset management programs. Our main sources of information include but are not limited to financial newspapers and magazines, inspection of corporate activities, research materials prepared by others, and annual reports, prospectuses, and corporate filings with the US Securities and Exchange Commission.

Fundamental analysis consists of analyzing financial statements of companies, calculating financial ratios, and reviewing cyclical trends of industries in conjunction with monetary policy indicators to assess the overall performance and profitability of the third-party money managers.

The investment strategies of Jones Wealth Management consist of suitable asset allocation, diversification, and risk management. Our general recommendations consist of third-party asset management programs that have a target asset mix of actively managed index mutual funds and exchange traded funds for long-term growth and income.

Material Risks of Methods of Analysis and Investment Strategies

Jones Wealth Management utilizes common analysis methods and investment strategies but even so, there remains some level of material risk. We primarily utilize fundamental analysis methods that measure the risks of companies by formulating assumptions based on historical financial representations. Although we use valid data sources, examine financial ratios extensively, refer to economic indicators, and review the implications of monetary policy, our strategies are implemented as a result of the assumptions derived from the analysis of historical data. The results of investment strategies derived from this method of analysis are not guaranteed and past performance of investment is not indicative of future financial returns.

Notwithstanding the method of analysis or investment strategy employed by our firm, the assets within your portfolio are subject to risk of devaluation or loss. Jones Wealth Management wants you to be aware that many different events that can affect the value of your assets or portfolio including, but not limited to, changes in financial status of companies, market fluctuations, changes in exchange rates, trading suspensions and delays, economic reports, and natural disasters. While this information provides a synopsis of the events that may affect your investments, this is not an exhaustive listing. **We want you to understand that there are inherent risks associated**

with investing and depending on the risk occurrences; you may LOSE ALL OR PART OF YOUR PRINCIPAL INVESTMENT.

Recommendation of Specific Types of Securities

Jones Wealth Management does not focus its advice on, or make recommendations relative to, any particular type of security. Our advice encompasses an array of securities and investment vehicles.

DISCIPLINARY INFORMATION (Item 9)

Neither Jones Wealth Management nor its management has been involved in legal or disciplinary events related to our advisory business.

OTHER FINANCIAL INDUSTRY ACTIVITIES AND AFFILIATIONS (Item 10)

Financial Industry Activities

Jones Wealth Management is not a registered broker-dealer and does not have an application pending for registration as a broker-dealer. Additionally, the Firm's investment advisor representative is not registered as, and does not have an application pending to register as, a securities salesperson.

Financial Industry Affiliations

Jones Wealth Management is not registered as, and does not have applications pending to register as, a Futures Commission Merchant, Commodity Pool Operator, or Commodity Trading Advisor, nor is its management or supervised person registered as an associated person thereof.

Other Affiliations

Brian K. Jones, Managing Member and Investment Advisor Representative of the Firm is also a licensed insurance agent that offers and sells insurance products for asset and income protection. Our insurance offerings include life insurance, disability insurance, long-term care, group life, and fixed annuities. Many of our insurance products are sold through separate and distinct vendors. We may devote up to fifty (50%) percent of our workweek to selling insurance products.

In Mr. Jones' capacity as an insurance agent, he receives separate, yet customary compensation for insurance product sales. Insurance products may be available through more cost-effective channels, and as a client, you are not obligated to purchase insurance products recommended by our firm.

Acting in dual capacities (insurance agent and investment advisor representative) and receiving compensation in dual capacities, creates conflicts of interest. Accordingly, this is our notification of the aforementioned conflict of interest; additional conflicts will be disclosed in writing prior to providing other services.

Nonetheless, neither Jones Wealth Management nor its management has any arrangement or relationship that is material to its business or clients with a related person that is a broker-dealer, municipal securities dealer, government securities dealer or broker, investment company or other pooled investment vehicle (including a mutual fund, closed-end investment company, unit investment trust, private investment company or "hedge fund," and offshore fund), other investment advisor or financial planner, futures commission merchant, commodity pool operator, commodity trading advisor, banking or thrift institution, accountant or accounting firm, lawyer or law firm, pension consultant, real estate broker or dealer, sponsor or syndicate of limited partnerships not already disclosed herein (also review Item 4 of Brochure Supplement - *Other Business Activities*).

Other Investment Advisers

We currently offer the services of other investments advisors registered with the SEC (US Securities and Exchange Commission) that offer institutional investment management services through multi-managers, select portfolios, and asset allocation platforms. We refer to these programs or platforms as Third-Party Asset Management Services throughout this document. Please also review Item 4, Advisory Services for general information regarding these third-party asset management services.

Due to the nature of these arrangements, the compensation derived from advisory products and services of other investment advisors can result in a substantial concentration of products and services that benefits the Firm. If any substantial concentration of products and service exists, this conflict of interest will be fully disclosed to clients before effecting transactions. Additionally, Jones Wealth Management's Chief Compliance Officer will periodically review transactions to evaluate client suitability to ensure compatibility with advisory programs and assess fee structures for compensation that appears to extend beyond customary thresholds.

CODE OF ETHICS, PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS, AND PERSONAL TRADING (Item 11)

Code of Ethics

Jones Wealth Management, and its management (collectively, "personnel") subscribe to a strict code of ethics. Our Code of Ethics is constructed to comply with the investment advisory laws and regulations that require firms to act as fiduciaries in transactions with their clients. Our inherent fiduciary duty requires that we act solely in your best interest and adhere to standards of utmost integrity in our communications and transactions. These standards ensure that your interests are given precedence.

Accordingly, we have implemented extensive policies, guidelines, and procedures that promote ethical practices and conduct by all of our firm's personnel. The foregoing has been compiled and is collectively referred to as our Code of Ethics. We adopted our Code of Ethics to specify and prohibit certain types of transactions deemed to create conflicts of interest (or perceived conflicts of interest), as well as to establish reporting requirements and enforcement procedures pertaining to personal transactions by our personnel. Jones Wealth Management's Code of Ethics, which specifically deals with professional standards, insider trading, personal trading, gifts and entertainment, and fiduciary duties, establishes ideals for ethical conduct based upon fundamental principles of openness, integrity, honesty, and trust. We will provide a copy of our complete Code of Ethics to any client or prospective client upon request.

Participation or Interest in Client Transactions

Jones Wealth Management does not recommend that clients buy or sell securities, which a related person may have, material financial interest.

Personal Trading

Proprietary Trading

We may at times, buy or sell securities for our own account that we have also recommended to clients. Jones Wealth Management will always document any transactions that could be construed as a conflict of interest. To mitigate or remedy any conflicts of interest or perceived conflicts of interest, we will monitor trading reports for adherence to our Code of Ethics.

Simultaneous Trading

From time to time, the Firm and its representatives may buy or sell advisory products for their own accounts at or around the same time as clients. In any instance where similar securities are purchased or sold, we will uphold our fiduciary duty by always ensuring that transactions are beneficial to the interest of our clients.

BROKERAGE PRACTICES (Item 12)

Selection and Recommendation**Investment Management Services**

Jones Wealth Management maintains a custodial services agreement with Shareholders Service Group, Inc., (SSG) for investment management services. Shareholders Service Group (CRD No. 8206) is a registered broker-dealer, member of FINRA/SIPC and we are participants of SSG's Institutional Advisory Services platform for independent investment advisors. SSG provides brokerage, operational support, and other custodial services to our firm. This choice of qualified custodian is based on its relatively low fees and expenses, execution capabilities, reputation, access to securities markets and expertise in handling brokerage support processes. As a result of our established service agreement, cost implications, operational support, and custodial services, SSG receives preferential status in selection and recommendation of custodians for our advisory transactions.

Third Party Asset Management Services

Jones Wealth Management does not select the custodians for the third-party asset management program. The custodial arrangements for the programs are pre-established and fully disclosed in the third-party money managers' disclosure Brochures (Form ADV 2A).

1. *Soft Dollar Benefits*

Jones Wealth Management does not receive research or other products or services (i.e., soft dollar benefits) from broker-dealers in exchange for placing trades or processing other securities related transactions for clients.

2. *Brokerage for Client Referrals*

Jones Wealth Management does not receive client referrals from broker-dealers or other third parties in exchange for using any particular broker-dealer.

3. *Directed Brokerage*

(a) As previously stated, if appropriate for service offering, Jones Wealth Management may recommend that clients utilize Shareholders Services Group. Our service agreement with SSG is designed to maximize efficiency and cost effectiveness on behalf of our clients. By recommending that clients to use SSG as a custodian, we seek to achieve the most favorable results relative to trading costs, allocation of funds, and rebalancing of client investments.

(b) Jones Wealth Management also permits clients to direct brokerage. If clients have their own preferred broker-dealer, we will notify the broker-dealer of our advisor-client relationship. Please be aware, however, when client's direct brokerage, we may not be able to effect transactions in the most cost-effective manner. Furthermore, we may be limited in our ability to aggregate transactions and clients may in turn, incur greater costs associated with brokerage transactions.

Order Aggregation

We rarely aggregate trades. Neither the size of our trades nor volume necessitates order aggregation. In the event an unanticipated need to aggregate clients' orders does arise, we would contact our account custodian/broker-dealer to assist in facilitating such a transaction.

REVIEW OF ACCOUNTS (Item 13)

Periodic Reviews

Jones Wealth Management criterion for reviewing client accounts is as follows:

1. Review of Financial Plans

Jones Wealth Management prepares, in conjunction with a third-party money manager, financial plans based on the financial data that clients provide to our firm. Financial plans are updated upon the client's election and request to do so. It is the client's responsibility to provide financial updates for information contained in the comprehensive Financial Plan and other Confidential Questionnaires.

2. Review of Investment Supervisory Portfolios

Jones Wealth Management reviews client account activity at least quarterly. Brian K. Jones, our firm's Chief Compliance Officer, reviews all account information. Based on our service offering, our review may consist of determining whether a client's portfolios and strategies continue to align with their stated investment goals and objectives. If reallocation of investments is necessary, we will contact the client to discuss the appropriate next actions.

3. Monitoring of Third-Party Asset Managers

We review third party money managers' activity quarterly and at least annually, perform a detailed review of clients' portfolios to ensure that the investment objective of the portfolio continuously aligns with the client's investment policy statement. This process includes reviewing the various asset classes, investment management styles, and specified risk and return requirements of the portfolio. If reallocation is necessary, we will contact the client regarding selecting different portfolios or adding new third-party money managers.

Intermittent Review Factors

Intermittent reviews may be triggered by substantial market fluctuation, economic or political events, or by changes in a client's financial status (such as retirement, termination of employment, relocation, or inheritance).

Client Reports

Jones Wealth Management does not issue separate reports to clients regarding accounts. Clients will receive statements at least quarterly from the account custodian(s), detailing your account activity, holdings, and performance.

CLIENT REFERRALS AND OTHER COMPENSATION (Item 14)

Economic Benefits for Advisory Services

For its offering of third-party asset management services to clients, Jones Wealth Management (or Brian K. Jones, individually) receives advisory compensation in the form of solicitor's fees from institutional investment advisors. The Firm's solicitor compensation and agreements comply with Rule 206(4)-3 and TN Rule 0780-04-03-.13.

Compensation for Client Referrals

Jones Wealth Management does not compensate any person for client referrals.

CUSTODY (Item 15)

Custodian of Assets

Jones Wealth Management does not hold physical custody of client funds or securities. We require that qualified custodians hold client assets. For more information regarding our choice of qualified custodian, please review the Brokerage Practices section (Item 12).

Account Statements

Client statements are mailed or sent electronically to the client by the account custodian. Clients are advised to review these statements carefully, comparing asset values, holdings, and advisory fees on your statement to that in previously received statements, confirmations, and fee invoices.

INVESTMENT DISCRETION (Item 16)

Non-Discretionary Authority

Jones Wealth Management does not exercise discretionary authority to supervise assets or accounts. We obtain client approval prior to implementation of recommendations, transactions, or choosing a specific third-party asset management program.

VOTING CLIENT SECURITIES (Item 17)

Jones Wealth Management does not vote proxies on behalf of clients. Our clients are responsible for directing their own proxies when solicited by issuers of securities. You are responsible for making elections relative to mergers, acquisitions, tender offers, bankruptcy proceedings, and other type events pertaining to the securities in your account. You will receive proxy and other solicitation information by mail from the account custodian. Please follow the instructions for proxy voting included in the mailing.

FINANCIAL INFORMATION (Item 18)

Balance Sheet Requirement

Jones Wealth Management does not require or solicit prepayment of more than \$500 in advisory fees, six (6) months or more in advance. Moreover, the Firm does not meet any custody requirement that would require submitting its balance sheet with this filing.

Discretionary Authority, Custody of Client Funds or Securities, and Financial Condition

Jones Wealth Management does not have discretionary authority with respect to supervising and directing the investments in client accounts. Our firm does not have custody of clients' funds or securities. More importantly, we do not have any financial condition that will impair our ability to meet contractual commitments to clients.

Bankruptcy Petition Filings

Jones Wealth Management has not been the subject of a bankruptcy petition at any time during the past ten (10) years.

REQUIREMENTS FOR STATE REGISTERED ADVISERS (Item 19)

Firm Management

Jones Wealth Management has one managing principal, Brian K. Jones, Managing Member. Information regarding the educational and business backgrounds of Brian K. Jones is delineated in the attached Brochure Supplement.

Other Business Activities

The other business activities of the Firm are listed in Item 10.

Performance-Based Fees

Jones Wealth Management does not assess performance-based fees. Neither management nor supervised persons of our firm receive performance-based compensation from advisory clients.

Disciplinary Disclosure Reporting

Arbitration Claims

NONE

Civil Litigation, Self-Regulatory Organization proceedings, or Administrative actions

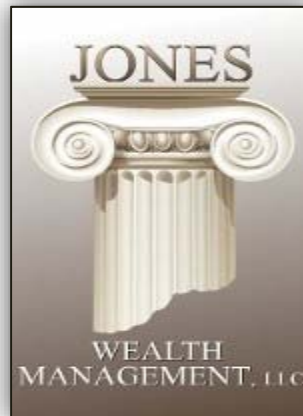
NONE

Relationships or Arrangements with Securities Issuers

Neither Jones Wealth Management nor its management has additional relationships or arrangements with any issuers of securities.

This brochure supplement provides information about Investment Adviser Representative, Jones (CRD No. 2543001) that supplements the firm brochure of Jones Wealth Management, LLC (IARD No. Brian K. Jones 156953). You should have received a copy of that Brochure. Please contact Brian K. Jones (see contact information below), if you did not receive the Jones Wealth Management Brochure or if you have any questions about the contents of this supplement.

Additional information about Investment Adviser Representative, Brian K. Jones, CRD No. 2543001 can be found on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. This website can be searched by using the investment adviser representative's CRD number (shown above).



BROCHURE SUPPLEMENT
for
Brian K. Jones

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October 23, 2019

BROCHURE SUPPLEMENT for Brian K. Jones, CRD No. 2543001

EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE (Item 2)

Jones Wealth Management requirements for Investment Advisor Representative Employment

We require that employees who provide advice on behalf of the firm have at least, a 4-year college degree, 2 years relevant work experience in the securities industry. Prospective employees must have also taken and passed the appropriate state advisory exam(s).

Investment Advisor Representative's Information Brian K. Jones

Year of Birth: 1971

Educational Background

Bachelor of Science, Business, University of Tennessee, Chattanooga, TN, 1994

Business Experience

<i>Founder, Chief Compliance Officer & Investment Advisor Representative</i> Jones Wealth Management, LLC, Chattanooga, TN	10/2011 to Present
<i>Insurance Agent</i> Jones Advisory Group, Chattanooga, TN	11/2008 to Present
<i>Registered Representative</i> Next Financial Group, Chattanooga, TN	12/2000 to 12/2011
<i>Registered Representative</i> Raymond James, Chattanooga, TN	12/2007 to 11/2008
<i>Registered Representative</i> UBS, Chattanooga, TN	09/2005 to 11/2007
<i>Registered Representative</i> Morgan Stanley, Chattanooga, TN	01/1995 to 09/2005

DISCIPLINARY INFORMATION (Item 3)

Criminal or Civil Actions

None. See Item 19 of our Brochure.

Administrative Actions or Proceedings

None. See Item 19 of our Brochure.

Self-Regulatory Organization (SRO) Proceedings

None. See Item 19 of our Brochure.

Professional Standard Violations

None.

OTHER BUSINESS ACTIVITIES (Item 4)

Investment Related

Brian K. Jones is not actively engaged in any investment related business other than that previously disclosed herein.

Non-Investment Related

Mr. Jones is also a licensed insurance agent who transacts insurance product sales through various insurance vendors. Mr. Jones will earn separate, yet customary compensation for insurance product sales. Mr. Jones may spend up to fifty (50%) percent of his workweek selling insurance products. Please also review Item 10, Other Affiliations section of the Firm Brochure for additional details.

ADDITIONAL COMPENSATION (Item 5)

Mr. Jones does not receive any advisory compensation individually however, as indicated in Item 10, Other Affiliations and Item 14, Client Referrals and Other Compensation of the Firm Brochure, Mr. Jones and/or the Firm receives solicitor's fees for offering Third Party Asset Management Services.

SUPERVISION (Item 6)

Mr. Jones is solely responsible for providing advice to clients and administration of the firm's operations. The Firm administers supervision through application of its written supervisory policies and procedures.

REQUIREMENTS FOR STATE REGISTERED ADVISERS (Item 7)

Additional IAR Disciplinary Events

Awards granted or findings of liability in consequential Arbitration Claims

None. See Item 19 of our Brochure.

Awards granted or findings of liability in consequential Civil, SRO, or Administrative proceedings.

None. See Item 19 of our Brochure.

IAR Bankruptcy Petition Filings

Mr. Jones has not been the subject of a bankruptcy petition at any time during the past ten (10) years.