

JEFFREY J. GALE, CFP<sup>®</sup>, CRPC<sup>®</sup>

WILLAMETTE FINANCIAL ADVISORS, LLC

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This Brochure Supplement provides information about Jeffrey J. Gale, CFP<sup>®</sup>, CRPC<sup>®</sup> with Willamette Financial Advisors, LLC (“WFA”) that supplements the Willamette Financial Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact James M. Jones, CFP<sup>®</sup>, at (503) 747-0306 or [jmj@wfinadv.com](mailto:jmj@wfinadv.com) if you did not receive WFA’s Brochure, or if you have any questions about the contents of this Brochure Supplement.

Additional information about Jeffrey J. Gale, CRD # 6664715, is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Jeffrey J. Gale, CFP<sup>®</sup>, CRPC<sup>®</sup>**

Year of Birth: 1993

### Education

Bachelor of Science in Finance, Oregon State University, 2017

### Business Background

01/2021 to Present	Investment Advisor Representative Willamette Financial Advisors, LLC
09/2018 to 12/2020	Investment Advisor Representative Blue Water Wealth, Inc.
09/2018 to 06/2019	Registered Representative Cambridge Investment Research, Inc.
06/2016 to 06/2018	Administrator Finity Group, LLC
02/2018 to 06/2018	Registered Representative and Investment Advisor Representative Cambridge Investment Research, Inc.
07/2016 to 11/2016	Registered Representative Cambridge Investment Research, Inc.
06/2015 to 09/2015	Intern StanCorp Mortgage Investors

### Industry Examinations and Professional Designations

Mr. Gale has previously taken and passed the following industry examinations:

FINRA Series 7: General Securities Representative Examination  
NASAA Series 66: Uniform Combined State Law Examination

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

The CFP<sup>®</sup> certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP<sup>®</sup> 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 are 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 the 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 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 the CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

**CHARTERED RETIREMENT PLANNING COUNSELOR<sup>SM</sup>, CRPC®:** Mr. Gale has obtained the Chartered Retirement Planning Counselor<sup>SM</sup> (CRPC®) designation. The CRPC® designation is offered by The College for Financial Planning®. The CRPC® Program focuses on the

pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning Counselor<sup>SM</sup> and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®.

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. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3 Disciplinary Information**

Mr. Gale has not been subject to any legal or disciplinary proceedings which would be considered material (or otherwise) to a Client's evaluation of him or any of the services he provides.

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

Mr. Gale has no other business activities to disclose at this time.

### **Item 5 Additional Compensation**

Mr. Gale does not receive additional compensation or economic benefit from third parties for providing advisory services to clients of Willamette Financial Advisors, LLC.

### **Item 6 Supervision**

Dr. Ronald A. Barry and Mr. James M. Jones, Managing Members of Willamette Financial Advisors, LLC, have oversight responsibility for all services and advice provided to Clients of WFA. Mr. Jones and Dr. Barry are also responsible for the overall compliance policies and procedures of the firm.