

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2023**



**STRONGBOX  
WEALTH**

**Jonathan G. Garlow, CPWA®**

**StrongBox Wealth, LLC  
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**[www.StrongBoxWealth.com](http://www.StrongBoxWealth.com)**

**Firm Contact:  
Charles Cooper III  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Garlow that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Cooper if you did not receive StrongBox Wealth, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Garlow is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #5847474.

## Item 2: Educational Background & Business Experience

**Jonathan Grant Garlow, CPWA®**

**Year of Birth:** 1980

**Educational Background:**

- 2007: University of Missouri; Master of Arts in Exercise Physiology
- 2003: University of Missouri; Bachelor of Arts in Nutrition & Fitness

**Business Background:**

- 08/2019 – Present StrongBox Wealth, LLC; Founding Partner
- 08/2019 – 07/2022 Purshe Kaplan Sterling Investments, Inc.; Registered Representative
- 09/2010 – 08/2019 Wells Fargo Advisors, LLC; Financial Advisor

**Exams, Licenses & Other Professional Designations:**

- 2016: Certified Private Wealth Advisor®, CPWA®
- 2010: Series 7 & 66 Exams

**Certified Private Wealth Advisor®, CPWA®**

The CPWA® designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. The designation is administered through The Investments & Wealth Institute (“IWI”) formerly known as the Investment Management Consultants Association. Prerequisites for the CPWA® designation are a Bachelor’s degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of professional client-centered experience in financial services or a related industry. CPWA® designees have completed a rigorous educational process that includes self-study requirements, an in-class education component, and successful completion of a comprehensive examination. CPWA® designees are required to adhere to the institute’s *Code of Professional Responsibility and Rules and Guidelines for Use of the Marks*. CPWA® designees must report 40 hours of continuing education credits, including two ethics hours, every 2 years to maintain the certification.

## Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Garlow.

<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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

Mr. Garlow is a licensed insurance agent/broker. He may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Garlow, as a fiduciary, will act in the client's best interest.

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

Mr. Garlow does not receive any other economic benefit for providing advisory services in addition to advisory fees.

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

Charles Cooper III, Chief Compliance Officer of StrongBox Wealth, LLC, supervises and monitors Mr. Garlow's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Cooper if you have any questions about Mr. Garlow's brochure supplement at 816-607-5410.