

*This brochure supplement provides information about Jocelyn Black Hodes that supplements the ClariFinancial LLC brochure. You should have received a copy of that brochure. Please contact Jocelyn Black Hodes if you did not receive ClariFinancial LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Jocelyn Black Hodes is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **ClariFinancial LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Jocelyn Black Hodes**

Personal CRD Number: 5136556

Investment Adviser Representative

ClariFinancial LLC  
1718 CENTRAL AVE SW SUITE C  
ALBUQUERQUE, NM 87104  
(505) 554-2329  
[clarifi505@gmail.com](mailto:clarifi505@gmail.com)

UPDATED: 01/13/2020

## Item 2: Educational Background and Business Experience

**Name:** Jocelyn Black Hodes      **Born:** 1980

### **Educational Background and Professional Designations:**

#### **Education:**

B.A. Journalism, Temple University - 2004

#### **Business Background:**

01/2020 - Present	Investment Adviser Representative ClariFinancial LLC
12/2018 - 12/2019	Marketing Director State of New Mexico
05/2018 - 11/2018	SVP, Investor Relations Greater Albuquerque Chamber of Commerce
11/2013 - 05/2018	Program Director Nationwide Mutual Insurance Company
04/2013 - 11/2013	Resident Financial Advisor Dailyworth, LLC
03/2012 - 03/2013	Financial Advisor Wells Fargo Advisors
11/2009 - 12/2010	Director of Development Jewish Learning Venture

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

Jocelyn Black Hodes is Officer of the Board of Directors for Congregation Albert, a religious membership organization providing religious education, cultural and community service programs. The Board has fiduciary responsibility for the financial stability and sustainability of the organization as well as voting rights for membership applications, issues pertaining to the organization's mission, strategic planning, budget, personnel and capital improvements. Jocelyn Black Hodes spends 0 hours per week on this activity during trading hours, and 4 hours per week outside trading hours on this activity.

From time to time, she may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. ClariFinancial LLC, LLC always acts in the best interest of the client and clients always have the right to decide whether or not to utilize the services of any representative of ClariFinancial LLC in such individual's outside capacities.

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

Jocelyn Black Hodes does not receive any economic benefit from any person, company, or organization, other than ClariFinancial LLC in exchange for providing clients advisory services through ClariFinancial LLC.

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

As the Chief Compliance Officer of ClariFinancial LLC, Jocelyn Black Hodes supervises all activities of the firm. Jocelyn Black Hodes's contact information is on the cover page of this disclosure document. Jocelyn Black Hodes adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Jocelyn Black Hodes has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Jocelyn Black Hodes has been the subject of a Chapter 7 bankruptcy filed in December 2015 which was discharged in March 2016.