



IAPD Report

JEREMY SCOT MARTINSON

CRD# 4587392

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When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

JEREMY SCOT MARTINSON (CRD# 4587392)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **08/05/2025**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	BAMBOO WEALTH STRATEGIES	CRD# 170093	02/04/2014
IA	SOVRAN ADVISORS, LLC	CRD# 329415	02/20/2024

QUALIFICATIONS

This representative is currently registered in **0** SRO(s) and **1** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
B	PURSHE KAPLAN STERLING INVESTMENTS	35747	San Diego, CA	08/28/2014 - 04/30/2020
IA	NEW ENGLAND SECURITIES CORPORATION	615	WOODLAND HILLS, CA	06/07/2013 - 12/04/2013
B	NEW ENGLAND SECURITIES	615	WOODLAND HILLS, CA	01/11/2013 - 12/04/2013

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **1** jurisdiction(s) and **0** SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **SOVRAN ADVISORS, LLC**
Main Address: 3131 CAMINO DEL RIO N.
SUITE 800
SAN DIEGO, CA 92108
Firm ID#: 329415

Regulator	Registration	Status	Date
IA California	Investment Adviser Representative	Approved	02/20/2024

Branch Office Locations

SOVRAN ADVISORS, LLC
3131 CAMINO DEL RIO N.
SUITE 800
SAN DIEGO, CA 92108

Employment 2 of 2

Firm Name: **BAMBOO WEALTH STRATEGIES**
Main Address: 3131 CAMINO DEL RIO NORTH
SUITE 1000
SAN DIEGO, CA 92108
Firm ID#: 170093

Regulator	Registration	Status	Date
IA California	Investment Adviser Representative	Approved	02/04/2014

Branch Office Locations

BAMBOO WEALTH STRATEGIES
3131 CAMINO DEL RIO NORTH
SUITE 1000
SAN DIEGO, CA 92108



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 1 principal/supervisory exam, 2 general industry/product exams, and 1 state securities law exam.

Principal/Supervisory Exams

Exam	Category	Date
General Securities Principal Examination (S24)	Series 24	08/17/2005

General Industry/Product Exams

Exam	Category	Date
Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
General Securities Representative Examination (S7)	Series 7	10/11/2002

State Securities Law Exams

Exam	Category	Date
Uniform Combined State Law Examination (S66)	Series 66	11/08/2002

PROFESSIONAL DESIGNATIONS

This section details that the representative has reported 1 professional designation(s).

Certified Financial Planner

This representative holds or did hold 1 professional designation(s) that may have been used to qualify as an Investment Advisor representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
B	08/28/2014 - 04/30/2020	PURSHE KAPLAN STERLING INVESTMENTS	CRD# 35747	San Diego, CA
IA	06/07/2013 - 12/04/2013	NEW ENGLAND SECURITIES CORPORATION	CRD# 615	WOODLAND HILLS, CA
B	01/11/2013 - 12/04/2013	NEW ENGLAND SECURITIES	CRD# 615	WOODLAND HILLS, CA
IA	11/26/2002 - 12/04/2013	METLIFE SECURITIES INC.	CRD# 14251	LOS ANGELES, CA
B	10/14/2002 - 12/04/2013	METLIFE SECURITIES INC.	CRD# 14251	LOS ANGELES, CA
B	10/14/2002 - 07/09/2007	METROPOLITAN LIFE INSURANCE COMPANY	CRD# 4095	SAN DIEGO, CA

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
01/2024 - Present	SOVRAN ADVISORS, LLC	President, Chief Financial Officer	Y	La Mesa, CA, United States
06/2019 - Present	SUMMACOR INC.	CHIEF FINANCIAL OFFICER	N	SAN DIEGO, CA, United States
02/2014 - Present	SPECTRUM PLANNING & ADVISORY	CHIEF FINANCIAL OFFICER	Y	SAN DIEGO, CA, United States
03/2003 - Present	SPECTRUM CONSULTING GROUP INC	CEO	N	LA MESA, CA, United States
08/2014 - 04/2020	PURSHE KAPLAN STERLING INVESTMENTS	REGISTERED REPRESENTATIVE	Y	ALBANY, NY, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

1. Spectrum Consulting Group, Inc.- Not Investment related. Chief executive officer and 100% owner of a company that provides bookkeeping & payroll processing services, as well as other ancillary business to business services such as business entity formation/evaluation/maintenance and general business consulting. 2004-Present. 6 hrs. month



Registration & Employment History



OTHER BUSINESS ACTIVITIES

2. SummaCor Inc.-Not investment related-Chief financial officer and chief operating officer. 3131 Camino Del Rio N Suite 1000, San Diego CA 92108-Implantable medical device design-Cardiac. 6/10/2019- present. 10 hrs/month-4 during trading hrs-
3. SOVRAN ADVISORS, LLC; INVESTMENT RELATED; 4344 Date Avenue, La Mesa CA 91941; REGISTERED INVESTMENT ADVISORY FIRM; PRESIDENT & CCO, January 10, 2024 - present. 25 HOUR PER MONTH, 10 DURING SECURITIES TRADING HOURS, 15 DURING NON SECURITIES TRADING HOURS
4. Lucia Health Guidelines LLC; Not investment related; Chief Financial Officer and Chief Operating Officer; Medical artificial intelligence software development; 4344 Date Ave., La Mesa, CA. 91941; 7/26/2021 - Present
5. Real Property Ownership Related Activities: a. Spectrum Capital Investments LLC- Member. Entity that holds residential rental real estate b. 4413 Date Avenue LLC-owned through Spectrum capital Investments LLC. residential rental real estate. c. Personally Owned Real Property: I directly own residential rental real estate.
6. Bamboo Insurance Services- owner and CFO. Fixed insurance business. 1 hrs/month
7. Coastal Insurance Solutions, Inc, DBA Sovran Insurance Services, Inc- owner and CFO. Fixed insurance brokerage business 2 hrs/month
8. JSM 1985 Holdings, Inc, DBA Sovran USA, Inc.: Holding company for Coastal Insurance solutions and Sovran Advisors, LLC
- 9 Non Profit Positions: a. John P Martin Foundation- Secretary. 1 hr./month b. La Mesa Community Kids Foundation-Not investment related-Keeping track of income and expenses. No discretion over funds. 2 signatures required on all checks. -Non Profit 501c3 that helps disadvantaged kids in the city of La Mesa CA-Treasurer-8/15/2018-1 hr/mth-0 during trading hrs-As the treasurer is responsible for tracking income & expenses & preparing financial statements. C. Commissioner: LA MESA SPRING VALLEY PERSONNEL COMMISSION; NOT INVESTMENT RELATED; 4750 DATE AVENUE, LA MESA, CA 91942; NON-PROFIT; COMMISSIONER; 12/19/2019; 2 HOURS PER MONTH, 0 HOURS DURING TRADING HOURS; PART OF A 3 PERSON COMMISSION THAT HEARS HR RELATED MATTERS THAT IMPACT CLASSIFIED EMPLOYEES IN THE SCHOOL DISTRICT. ATTEND MONTHLY MEETINGS AND ATTEND TO MATTERS THAT ARISE FROM THOSE MEETINGS; Approximately 5 hrs./month; d. Strong Foundations for La Mesa Spring Valley Schools. not investment related; 1069 Graves Avenue, #100, El Cajon, CA 92021; Charitable organization; Chairman; started 09/2020, 4 hrs/mo not during trading. D. PROJECT LION HEART; NOT INVESTMENT RELATED; 11716 EASTFIELD RD, POWAY, CA 92064; NON-PROFIT 501 C3 FOUNDATION; TREASURER/CFO/SECRETARY/DIRECTOR; STARTED 10/2024; 2 HRS/MON, 0 HRS/MON DURING TRADING HRS.; DUTIES INCLUDE MAINTAINING BOOKS & RECORDS FOR THE CORPORATION, INCLUDING COMPILING FINANCIAL STATEMENTS AND FILING INCOME TAX RETURNS AND OTHER REGULAR FILINGS; VOTING MEMBER OF THE BOARD OF DIRECTORS
10. Spectrum Planning & Advisory Services Inc. d/b/a Bamboo Wealth Strategies; INVESTMENT RELATED; 3131 Camino Del Rio North, Suite 1000, San Diego, CA 92108; REGISTERED INVESTMENT ADVISORY FIRM; CFO, February 2014 - present. 25 HOUR PER MONTH, 10 DURING SECURITIES TRADING HOURS, 15 DURING NON SECURITIES TRADING HOURS
11. Sovran Business Services; NOT INVESTMENT RELATED; 3131 Camino Del Rio N, Suite 1350, San Diego, CA. 92108; Primarily providing bookkeeping, payroll and related services for small business; CFO; 5/15/2025 - Present; 2 HOUR PER MONTH



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1

Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

Disclosure 1 of 1

Reporting Source:	Individual
Employing firm when activities occurred which led to the complaint:	METLIFE
Allegations:	CLIENTS ALLEGES THE VARIABLE LIFE INSURANCE POLICIES THEY PURCHASED IN MAY 2003 WERE MISREPRESENTED AS AN INVESTMENT OPPORTUNITY. CLIENT ARE REQUESTING A REFUND OF PREMIUM.
Product Type:	Insurance
Other Product Type(s):	VARIABLE LIFE INSURANCE
Alleged Damages:	\$20,636.00

Customer Complaint Information

Date Complaint Received:	07/30/2004
Complaint Pending?	No
Status:	Denied
Status Date:	09/16/2004

Settlement Amount:

Individual Contribution Amount:



End of Report

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