

**Form ADV Part 2B: Brochure Supplement  
January 30, 2024**



**Jordan Ian Szekely**

**Cherrydale Wealth Management, LLC  
221 River Street, 9<sup>th</sup> Floor  
Hoboken, NJ 07030**

**Firm Contact:  
Jordan I. Szekely  
Chief Compliance Officer**

This Form ADV 2B ("Brochure Supplement") provides information about Jordan Szekely that supplements the Cherrydale Wealth Management, LLC ("CWM") Disclosure Brochure. You should have received a copy of that Disclosure Brochure. Please contact Jordan Szekely, Chief Compliance Officer, if you did not receive the CWM Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Jordan Szekely is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with Mr. Szekely's name or his Individual CRD# 5752557.

## Item 2: Educational Background & Business Experience

**Jordan Ian Szekely**

**Year of Birth:** 1977

### **Educational Background:**

- 2006; Columbia Graduate School of Business; M.B.A. – Finance and Applied Value Investing
- 1999; University of Pennsylvania; B.A. – Economics and Psychology

### **Business Background:**

- 08/2014 – Present Cherrydale Wealth Management, LLC; Chief Compliance Officer
- 08/2012 – 07/2014 Evercore Wealth Management; Financial Advisor
- 01/2010 – 04/2012 Goldman Sachs; Private Wealth Advisor
- 01/2009 – 12/2009 Industry Ventures; Consultant
- 03/2008 – 12/2008 Focus Financial Partners; Vice President
- 08/2006 – 02/2008 Veronis Suhler Stevenson; Senior Associate
- 07/2005 – 09/2005 Point72 Asset Management (fka SAC Capital); Analyst - M.B.A. Intern
- 09/2004 – 12/2004 GAMCO Investors (fka Gabelli Asset Management Company); Analyst - M.B.A. Intern
- 08/2001 – 07/2004 TA Associates; Associate
- 07/1999 – 07/2001 Lehman Brothers; Mergers & Acquisitions Analyst

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

- 06/2014: Series 65

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to the evaluation of Jordan Szekely.

## Item 4: Other Business Activities

We have nothing to disclose in this regard.

## Item 5: Additional Compensation

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

## Item 6: Supervision

Jordan Szekely is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.