



# **Rookwood Wealth Management, LLC**

## **Individual Disclosure Supplement**

(Part 2B of Form ADV: Brochure Supplement - 12/31/2023)

for

**Eva C. Gilkey Booher, CFA**

**Investment Advisor Representative**

*This brochure supplement provides information about Eva C. Gilkey Booher, CFA that supplements the Rookwood Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Eva Gilkey Booher (513) 871-7815 or by email at [Eva@Rookwood.biz](mailto:Eva@Rookwood.biz) if you did not receive Rookwood's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Eva Gilkey Booher, CFA is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Eva C. Gilkey Booher's CRD number is 2140342.*

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*Registration does not imply a certain level of skill or training.*

## **Item 2 - Educational Background and Business Experience**

Eva C. Gilkey Booher is the founder/owner of Rookwood Wealth Management, LLC ("Rookwood"). Ms. Booher was born in 1959 and graduated from Miami University, Oxford, Ohio in 1987 with a BS in Finance. Ms. Booher earned her Chartered Financial Analyst designation in 1990 and is currently a member of the CFA Institute. Ms. Booher has over 30 years of experience in providing wealth management advice. Ms. Booher's business background includes the following:

- Rookwood Wealth Management, LLC, Founder and President (2007 – Present)
- Bartlett and Co., Managing Director and Senior Portfolio Manager (1991 - 2001)
- Renaissance Investment Co., Portfolio Manager (1990 - 1991)
- Third National Bank, Nashville, Tennessee, Trust Investment Officer (1987 - 1990)
- Johnson Investment Counsel, Inc., Assistant Portfolio Manager (1987)

The Chartered Financial Analyst charter is a globally respected, graduate-level investment credential established in 1962 and awarded by the CFA Institute — the largest global association of investment professionals. There are currently more than 175,000 CFA charter holders working in over 140 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

**High Ethical Standards** - The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charter holders to: (i) place their clients' interests ahead of their own, (ii) maintain independence and objectivity, (iii) act with integrity, (iv) maintain and improve their professional competence, and (v) disclose conflicts of interest and legal matters.

**Global Recognition** - Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charter holders—often making the charter a prerequisite for employment. Additionally, regulatory bodies in many countries recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

**Comprehensive and Current Knowledge** - The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession. To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

Ms. Booher has no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business that she is required to report.

**Item 4 - Other Business Activities**

Ms. Booher is not engaged in any investment-related business or occupation other than Rookwood.

**Item 5 - Additional Compensation**

Other than salary and typical employee benefits, Ms. Booher does not receive any economic benefit from any person, company or organization, in exchange for providing clients with investment advisory services through Rookwood.

**Item 6 - Supervision**

Ms. Booher is the only owner and representative of Rookwood. As such, she supervises all duties and activities. Ms. Booher can be contacted at 513-871-7815 or [Eva@Rookwood.biz](mailto:Eva@Rookwood.biz).