

Item 1: Cover Page
Form ADV Part 2B - Brochure Supplement
March 2024

Jordan Dechtman



7807 E Peakview Avenue, Suite 410
Centennial, Colorado 80111
<https://dechtmanwealth.com/>

Firm Contact:
Linda Roberts
Chief Compliance Officer

This brochure supplement provides information about Mr. Dechtman that supplements our brochure. You should have received a copy of that brochure. Please contact Linda Roberts if you did not receive Dechtman Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Dechtman is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 1516831.

Item 2: Educational Background & Business Experience

Jordan Dechtman

Year of Birth: 1962

Educational Background:

- 1984: University of Arizona; Bachelor of Science in Finance

Business Background:

- 08/2020 – Present Dechtman Wealth Management, LLC; Founder & CEO
- 03/2022 – Present Purshe Kaplan Sterling Investments, Inc.; Registered Representative
- 01/1995 – 02/2022 Securities America, Inc.; Registered Representative
- 05/1990 – 12/1994 Princor Financial Services Corporation

Exams, Licenses & Other Professional Designations:

- Colorado Insurance Licensed: Accident, Health, Life, and Variable Products
- 1995: Series 63 & 22 Exams
- 1990: Series 6 Exam

Item 3: Disciplinary Information¹

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

Item 4: Other Business Activities

Mr. Dechtman is a registered representative of Purshe Kaplan Sterling Investments, Inc., a SIPC and FINRA member broker-dealer, and 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. Dechtman, as a fiduciary, will act in the client's best interest.

Item 5: Additional Compensation

Mr. Dechtman does not receive any other economic benefit for providing advisory services in addition to advisory fees. We encourage you to review this Form ADV closely and discuss any potential conflicts of interest with Ms. Roberts.

Item 6: Supervision

Linda Roberts, Chief Compliance Officer of Dechtman Wealth Management, LLC, supervises and monitors Mr. Dechtman's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Roberts if you have any questions about Mr. Dechtman's brochure supplement at 303-741-9772.

¹ 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.

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Sam Dechtman



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Item 2: Educational Background & Business Experience

Sam Dechtman

Year of Birth: 1992

Educational Background:

- 2014: University of Wisconsin-Madison; Bachelor of Business Administration – Marketing, Risk Management & Insurance

Business Background:

- 08/2020– Present Dechtman Wealth Management, LLC; Wealth Advisor
- 06/2017 – 02/2022 Securities America, Inc.; Registered Representative
- 06/2014 – 06/2017 Nuveen; Internal Consultant

Exams, Licenses & Other Professional Designations:

- Colorado Insurance Licensed: Accident, Health, Life, and Variable Products
- 2018: Certified Fund Specialist, CFS®
- 2017: CERTIFIED FINANCIAL PLANNER™, CFP®
- 2014: Series 66 Exam
- 2013: Series 7 Exam

CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL

Mr. Dechtman is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Certified Fund Specialist® (CFS®)

Mr. Dechtman holds the Certified Fund Specialist® (CFS®) designation. The CFS® designation denotes completion of a certificate program related to mutual fund training that is administered by the Institute of Business and Finance. Candidates are required to take six academic modules covering the following topics: asset class descriptions, historical returns and risk, mutual fund costs, fund management and selection, time value analysis and market indicators, REITs, ETFs, CEFs, UITs and structured notes, risk measurements and minimization, fund and personal tax issues, and modern portfolio theory. Candidates must successfully pass three exams which cumulatively test each of the six modules. Moreover, each candidate is required to complete a case study. Candidates are required to complete 30 hours of continuing education every two years and have ongoing ethical requirements administered by the Institute of Business and Finance.

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Item 4: Other Business Activities

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Item 2: Educational Background & Business Experience

Adam Dechtman

Year of Birth: 1992

Education Background:

- 2014: University of Kansas; Bachelor's in Communication

Business Background:

- 08/2020– Present Dechtman Wealth Management, LLC; Wealth Advisor
- 06/2018 – 02/2022 Securities America, Inc.; Registered Representative
- 07/2014 – 05/2018 John Hancock Investments; Internal Wholesaler

Exams, Licenses & Other Professional Designations:

- Colorado Insurance Licensed: Accident, Health, Life, and Variable Products
- 2018: CERTIFIED FINANCIAL PLANNER™, CFP®
- 2018: Accredited Investment Fiduciary, AIF
- 2017: Series 66 Exam
- 2015: Series 7 Exam

CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Accredited Investment Fiduciary® (AIF®)

Mr. Dechtman holds the Accredited Investment Fiduciary® (AIF®) designation. The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF® designation, the individual must annually attest to the Code of Ethics and Conduct Standards and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

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