

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
July 2020**

**Jared McBride**



**GOALFUSION**  
WEALTH MANAGEMENT

**7611 Creekbluff Drive  
Austin, Texas 78750  
[www.GoalFusion.com](http://www.GoalFusion.com)**

**Firm Contact:  
Jared McBride  
Chief Compliance Officer**

This brochure supplement provides information about Mr. McBride that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. McBride if you did not receive Laudadio Consulting, LLC dba GoalFusion Wealth Management's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. McBride is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #6090029.

## Item 2: Educational Background & Business Experience

**Jared McBride**

**Year of Birth:** 1987

### **Educational Background:**

- 2014: Weber State University; Masters in Business Administration
- 2010: Utah State University; Bachelor of Science in Accounting

### **Business Background:**

- 07/2020 – Present      GoalFusion Wealth Management; Founding Partner & Chief Compliance Officer
- 09/2015 – 07/2020      Ameriprise Financial; Financial Advisor
- 07/2015 – 09/2015      Edward Jones; Financial Advisor
- 05/2012 – 05/2015      Goldman Sachs; Lead Operations Associate
- 04/2010 – 05/2012      America First Credit Union; Assistant Lead Teller

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

- 2018: CERTIFIED FINANCIAL PLANNER™, CFP®
- 2015: Series 7 & Series 66 Exams
- 2015: Texas Life, Accident, Health & Health Insurance Licensed (Lic#2026259)

### **CERTIFIED FINANCIAL PLANNER™, CFP®**

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP® Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

### **Item 3: Disciplinary Information<sup>1</sup>**

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

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

Mr. McBride is a licensed insurance agent/broker. He will not, however, be offering insurance products nor will he receive customary fees as a result of insurance sales.

Mr. McBride is the sole proprietor/owner of McBride Tax Consulting where he provides tax consulting and preparation. These services are independent of our firm's financial planning and investment advisory services and are governed under a separate engagement agreement. Clients have the option of engaging Mr. McBride for tax consulting or preparation services, however, they are under no obligation to do so.

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

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

### **Item 6: Supervision**

Cary Laudadio is the principal of GoalFusion Wealth Management and as such supervises and monitors Mr. McBride's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Laudadio if you have any questions about Mr. McBride's brochure supplement at 512-593-6367.

### **Item 7: Requirements for State-Registered Advisers**

Mr. McBride has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.

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<sup>1</sup> 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.