

**Form ADV Part 2B: Brochure Supplement
January 22, 2021**



Jordan Ian Szekely

**Cherrydale Wealth Management, LLC
547 North Avenue, #132
New Rochelle, NY 10801**

**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 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.