

## Item 1 Cover Page

A.

**Todd C. Macke**

Macke Financial Advisory Group, Inc.

ADV Part 2B, Brochure Supplement  
Dated October 30, 2023

Contact: Kevin P. Jordan, Chief Compliance Officer  
12699 New Brittany Blvd.  
Fort Myers, Florida 33907

B.

**This Brochure Supplement provides information about Todd C. Macke that supplements the Macke Financial Advisory Group, Inc. Brochure; you should have received a copy of that Brochure. Please contact Todd C. Macke, Chief Compliance Officer, if you did *not* receive Macke Financial Advisory Group, Inc.’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Todd C. Macke is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Todd C. Macke was born in 1961. Mr. Macke graduated from Ohio State University in 1983, with a BS-BA degree in Marketing. Mr. Macke has been the President and an investment adviser representative of Macke Financial Advisory Group, Inc. since June 1996.

Mr. Macke 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](http://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.

### Item 3 Disciplinary Information

None.

### Item 4 Other Business Activities

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.

- B. Mr. Macke is a limited partner in various partnerships that invest in real estate (the “Partnerships”). In the event that an investment in any Partnership is suitable for a client given that client’s investment objectives and financial situation, Firm may recommend that the client purchase an interest in such Partnership. The purchase of, or provision of any advice relative to, any such Partnership interest by Firm is a conflict of interest. Any purchase of a Partnership interest will be strictly on a non-discretionary basis and no client will be under any obligation to purchase any Partnership interest.

### **Item 5 Additional Compensation**

None.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant’s policies and procedures manual. The primary purpose of the Registrant’s Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the “Act”). The Registrant’s Chief Compliance Officer, Kevin P. Jordan, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Mr. Jordan at (239) 275-1122.

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A.

**Kevin Patrick Jordan**

Macke Financial Advisory Group, Inc.

ADV Part 2B, Brochure Supplement  
Dated October 30, 2023

Contact: Todd C. Macke, Chief Compliance Officer  
12699 New Brittany Blvd.  
Fort Myers, Florida 33907

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**This Brochure Supplement provides information about Kevin Patrick Jordan that supplements the Macke Financial Advisory Group, Inc. Brochure; you should have received a copy of that Brochure. Please contact Todd C. Macke, Chief Compliance Officer, if you did *not* receive Macke Financial Advisory Group, Inc.’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Kevin Patrick Jordan is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Kevin Patrick Jordan was born in 1992. Mr. Jordan graduated from the University of Florida in 2013, with a BS degree in Psychology. Mr. Jordan has been the Chief Compliance Officer and Chief Operating Officer since February, 2022. Mr. Jordan has been the Director of Operations of Macke Financial Advisory Group, Inc. since August 2019. From June 2017 through June 2019, Mr. Jordan was a Senior Credit Analyst with Herc Rentals.

Mr. Jordan 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](http://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.

Mr. Jordan has been a Certified Financial Therapist-ITM (CFT-ITM) professional since 2023. The Financial Therapy Association ("FTA") owns the CFT-ITM certification mark, and the Certified Financial Therapist-ITM mark.

To earn the CFT-ITM designation, individuals must complete specific educational and experience requirements across the disciplines of financial therapy, financial planning and counseling, and

therapeutic competencies. Applicants and designation holders must adhere to the FTA Standards of Practice and a Code of Ethics.

There are three CFT™ levels. Level I is foundational and provides knowledge and skills. Levels II and III are required for those who practice financial therapy as a primary discipline.

CFT™ professionals must adhere to several educational, competency, experiential, and examination standards to earn the designation.

- Education: CFT-IT™ applicants are required to have a Bachelor's degree or higher in a financial related field, a mental health related field, or hold the CFP® or AFC® designations.
- Competency Training: all candidates for the CFT-IT™ certification must acquire the necessary competency in Financial Therapy areas via the FTA's educational video series.
- Experience: Part I applicants are required to have a total of 500 hours of experience, 250 of which must be direct services hours. Part II and Part III applicants must have a letter of reference submitted on their behalf, and a summary narrative of how the CFT-IT™ has impacted their work, respectively.
- Examination: CFT-IT™ applicants must successfully pass a comprehensive certification exam after completing all necessary competency training. The examination consists of 100 multiple-choice questions.
- Ethical Standards: Applicants must sign an agreement for adherence to the FTA Standards of Practice and Code of Ethics.
- Continuing Education: Once certified, CFT-IT™ designation holders must complete 20 hours of continuing education bi-annually to maintain the designation.

### **Item 3 Disciplinary Information**

None.

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

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

None.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section

203(e)(6) of the Investment Advisers Act of 1940 (the “Act”). The Registrant’s Chief Compliance Officer, Kevin P. Jordan, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Mr. Jordan at (239) 275-1122.