



# RIVERCHASE

## WEALTH MANAGEMENT

**Form ADV Part 2B  
Individual Disclosure Brochure**

Version date: April 5, 2024

**Jaco Jordaan, CFP®, CFA®, CRPS, ChFC, CAIA, EA**

Personal CRD Number: 2788224

Investment Advisor Representative

2361 Southwood Dr

Upper St. Clair, PA 15241

Phone: (303)325-7945

Email: [jaco@riverchasewealth.com](mailto:jaco@riverchasewealth.com)

This brochure supplement provides information about Jaco Jordaan that supplements the Riverchase Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sean Paul Kelleher, Managing Member if you did not receive the Riverchase Wealth Management, LLC brochure, or if you have any questions about the contents of this supplement.

Additional information about Jaco Jordaan is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

## Item 2: Educational Background and Business Experience

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Name: Jaco Jordaan

Born: 1974

### Education Background and Professional Designations

#### Education:

College for Financial Planning, Master of Science - 2005

University of Texas, Bachelor of Business Administration - 1996

#### Designations:

##### **CERTIFIED FINANCIAL PLANNER (CFP®)**

Candidates must pass a CFP-board registered program or hold one of seven advanced degrees, designations or professional licenses and pass the CFP exam. Prerequisites include a bachelor's degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience. Thirty hours of continuing education must be completed every two years. Areas of study include insurance and estate planning, employee benefit and tax planning, as well as investment and retirement planning. CFP practitioners are also subject to strict adherence to the CFP Board's Financial Planning Practice Standards and Professional Code of Ethics and Responsibility.

##### **CHARTERED FINANCIAL ANALYST (CFA®)**

The curriculum for this designation is a self-study program consisting of three levels requiring approximately 250 hours of study for each level. Candidates must pass an exam for each level as well. Prerequisites include an undergraduate degree and four years of professional experience involving investment decision-making or four years qualified work experience. Areas of study involve fundamental investment principles such as ethical and professional standards, economics, quantitative methods, accounting, corporate finance, portfolio and investment management and wealth planning. The program's professional conduct requirements require that both CFA candidates and CFA charter holders adhere to the highest standards of ethical responsibility.

##### **CHARTERED RETIREMENT PLAN SPECIALIST (CRPS®)**

The Chartered Retirement Plan Specialist designation is a graduate level program for advisors focusing on creating and administering retirement plans for businesses. Topics include the types and characteristics of retirement plans, IRAs, SEP, SIMPLE, 401(k), 403(b), 457, and defined benefit plans. The program also includes a focus on qualified plan IRS and DOL compliance testing, fiduciary roles and responsibilities, and plan administration. Designees are subject to a code of ethics and continuing education requirements.

##### **CHARTERED FINANCIAL CONSULTANT (CHFC®)**

The curriculum for this designation consists of six core and two elective courses, with a final proctored exam for each course. Prerequisites include three years of full-time business experience within the past five years. Continuing education requirement is 30 CE credits every two years. Areas of study include

fundamental instruction on the concepts of financial planning, including investment, retirement, estate, insurance, and tax planning. Individuals who have earned this designation must adhere to The American College Code of Ethics and Procedures.

**CHARTERED ALTERNATIVE INVESTMENT ANALYST (CAIA)**

The Chartered Alternative Investment Analyst (CAIA) Charter, recognized globally, is administered by the Chartered Alternative Investment Analyst Association, and requires a comprehensive understanding of core and advanced concepts regarding alternative investments, structures, and ethical obligations. To qualify for the CAIA Charter, finance professionals must complete a self-directed, comprehensive course of study on risk- return attributes of institutional quality alternative assets; pass both the Level I and Level II CAIA examinations at global, proctored testing centers; attest annually to the terms of the Member Agreement; and hold a US bachelor’s degree (or equivalent) plus have at least one year of professional experience or have four years of professional experience. Professional experience includes full-time employment in a professional capacity within the regulatory, banking, financial, or related fields. Once a qualified candidate completes the CAIA program, he or she may apply for CAIA membership and the right to use the CAIA designation, providing an opportunity to access ongoing educational opportunities. To learn more about the CAIA, visit [www.CAIA.org](http://www.CAIA.org).

**ENROLLED AGENT (EA)**

An enrolled agent is a person who has earned the privilege of representing taxpayers before the Internal Revenue Service by either passing a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Enrolled agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years.

Enrolled agents, like attorneys and certified public accountants (CPAs), have unlimited practice rights. This means they are unrestricted as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can represent clients before. Learn more about enrolled agents in Treasury Department Circular 230.

**Business Background**

04/2024 – Present	Riverchase Wealth Management, LLC; Wealth Manager
03/2020 – Present	Opus Financial Solutions, LLC; Wealth Manager
03/2017 – 03/2020	Sanitas Wealth Management, LLC; Managing Member and Financial Advisor
03/2007 – 05/2017	H.D Vest Advisory Services; Investment Adviser Representative
01/2007 – 05/2017	H.D Vest Investment Securities; Registered Representative

### **Item 3: Disciplinary Information**

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There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

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Jaco Jordaan will continue to be engaged as Wealth Manager through Opus Financial Solutions LLC until his transition to Riverchase Wealth Management is complete. At that point, this disclosure will be updated to reflect Jaco Jordaan is not engaged in any investment-related business or occupation (other than this advisory firm).

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

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Other than investment advisory fees, Jaco Jordaan does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Riverchase Wealth Management, LLC.

### **Item 6: Supervision**

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Jaco Jordaan is supervised by Sean Kelleher, co-owner and representative of Riverchase Wealth Management, LLC. Sean Paul Kelleher works closely with co-owner Albert Everett Dean III to supervise all duties and activities of the firm. Sean Paul Kelleher's can be reached at (972)471-9013 or [sean@riverchasewealth.com](mailto:sean@riverchasewealth.com).