

# Brochure Supplement

APRIL 28, 2017



## DANIEL L. KATZ

411 Hackensack Avenue, Suite 1005  
Hackensack, NJ 07601

(877) 724-5697

This Brochure Supplement provides information about Daniel L. Katz that supplements the Disclosure Brochure of Revolve Wealth Partners, LLC (hereinafter "Revolve Wealth Partners"), a copy of which you should have received. Please contact Revolve Wealth Partners's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Daniel L. Katz is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Revolve Wealth Partners, LLC, a Registered Investment Adviser**

411 Hackensack Avenue, Suite 1005, Hackensack, NJ 07601 | (877) 724-5697  
[www.revolvewealth.com](http://www.revolvewealth.com)

## Item 2. Educational Background and Business Experience

Born 1982

### Post-Secondary Education

University of Maryland | B.S., Economics | 2004

### Recent Business Background

Revolve Wealth Partners, LLC | Investment Adviser Representative | April 2017 – Present

Purshe Kaplan Sterling Investments, Inc. | Registered Representative | April 2017 – Present

Oppenheimer & Co, Inc. | Investment Adviser Representative and Registered Representative | June 2009 – April 2017

### Professional Designation

Daniel L. Katz holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

For additional information about this credential, please refer directly to the website of the issuing organization.

## Item 3. Disciplinary Information

Revolve Wealth Partners is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Daniel L. Katz. Revolve Wealth Partners has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

Revolve Wealth Partners is required to disclose information regarding any investment-related business or occupation in which Daniel L. Katz is actively engaged.

### **Registered Representative of a Broker-Dealer**

Daniel L. Katz is a registered representative of Purshe Kaplan Sterling Investments, Inc. (“PKS”), an SEC registered broker-dealer and member of FINRA. In this capacity, Daniel L. Katz may provide securities brokerage services and implement securities transactions under a commission based arrangement. Daniel L. Katz may be entitled to a portion of the brokerage commissions paid to PKS, as well as a share of any ongoing distribution or service (“trail”) fees from the sale of mutual funds.

A conflict of interest exists to the extent that Daniel L. Katz recommends the purchase of securities where he receives commissions or other additional compensation as a result. This practice may give him an incentive to recommend investment products based on compensation received rather than on the client’s needs. Revolve Wealth Partners has procedures in place to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned. For certain accounts covered by ERISA (and such others that the firm deems appropriate), Revolve Wealth Partners provides investment advisory services on a fee offset basis, whereby the firm reduces its fee by an amount equal to the aggregate commissions and 12b-1 fees earned by Daniel L. Katz in his individual capacity as a registered representative of PKS.

### **Licensed Insurance Agent**

Daniel L. Katz is a licensed insurance agent and in such capacity may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that Revolve Wealth Partners recommends the purchase of insurance products where Daniel L. Katz receives insurance commissions or other additional compensation. Revolve Wealth Partners seeks to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned.

## **Item 5. Additional Compensation**

Revolve Wealth Partners is required to disclose information regarding any arrangement under which Daniel L. Katz receives an economic benefit from someone other than a client for providing investment advisory services. Revolve Wealth Partners has no information to disclose in relation to this Item.

## **Item 6. Supervision**

Logan M. Trenz, Chief Compliance Officer, is generally responsible for supervising Daniel L. Katz’s advisory activities on behalf of Revolve Wealth Partners. Logan M. Trenz can be reached at the firm’s main telephone number listed on the cover page of this Brochure Supplement.

Revolve Wealth Partners supervises its personnel and the investments made in client accounts. Revolve Wealth Partners monitors the investments recommended by Daniel L. Katz to ensure they are suitable for

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the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Revolve Wealth Partners periodically reviews the advisory activities of Daniel L. Katz, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Daniel L. Katz.

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## MICHAEL S. ISRAEL

411 Hackensack Avenue, Suite 1005  
Hackensack, NJ 07601

(877) 724-5697

This Brochure Supplement provides information about Michael S. Israel that supplements the Disclosure Brochure of Revolve Wealth Partners, LLC (hereinafter "Revolve Wealth Partners"), a copy of which you should have received. Please contact Revolve Wealth Partners's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Michael S. Israel is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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[www.revolvewealth.com](http://www.revolvewealth.com)

## Item 2. Educational Background and Business Experience

Born 1974

### Post-Secondary Education

Golden Gate University | B..A., Business Administration | 1996

### Recent Business Background

Revolve Wealth Partners, LLC | Investment Adviser Representative | April 2017 – Present

Purshe Kaplan Sterling Investments, Inc. | Registered Representative | April 2017 – Present

Oppenheimer & Co, Inc. | Investment Adviser Representative and Registered Representative | June 2009 – April 2017

### Professional Designation

Michael S. Israel holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

For additional information about this credential, please refer directly to the website of the issuing organization.

## Item 3. Disciplinary Information

Revolve Wealth Partners is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Michael S. Israel. Revolve Wealth Partners has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

Revolve Wealth Partners is required to disclose information regarding any investment-related business or occupation in which Michael S. Israel is actively engaged.

### **Registered Representative of a Broker-Dealer**

Michael S. Israel is a registered representative of Purshe Kaplan Sterling Investments, Inc. (“PKS”), an SEC registered broker-dealer and member of FINRA. In this capacity, Michael S. Israel may provide securities brokerage services and implement securities transactions under a commission based arrangement. Michael S. Israel may be entitled to a portion of the brokerage commissions paid to PKS, as well as a share of any ongoing distribution or service (“trail”) fees from the sale of mutual funds.

A conflict of interest exists to the extent that Michael S. Israel recommends the purchase of securities where he receives commissions or other additional compensation as a result. This practice may give him an incentive to recommend investment products based on compensation received rather than on the client’s needs. Revolve Wealth Partners has procedures in place to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned. For certain accounts covered by ERISA (and such others that the firm deems appropriate), Revolve Wealth Partners provides investment advisory services on a fee offset basis, whereby the firm reduces its fee by an amount equal to the aggregate commissions and 12b-1 fees earned by Michael S. Israel in his individual capacity as a registered representative of PKS.

### **Licensed Insurance Agent**

Michael S. Israel is a licensed insurance agent and in such capacity may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that Revolve Wealth Partners recommends the purchase of insurance products where Michael S. Israel receives insurance commissions or other additional compensation. Revolve Wealth Partners seeks to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned.

## **Item 5. Additional Compensation**

Revolve Wealth Partners is required to disclose information regarding any arrangement under which Michael S. Israel receives an economic benefit from someone other than a client for providing investment advisory services. Revolve Wealth Partners has no information to disclose in relation to this Item.

## **Item 6. Supervision**

Logan M. Trenz, Chief Compliance Officer, is generally responsible for supervising Michael S. Israel’s advisory activities on behalf of Revolve Wealth Partners. Logan M. Trenz can be reached at the firm’s main telephone number listed on the cover page of this Brochure Supplement.

Revolve Wealth Partners supervises its personnel and the investments made in client accounts. Revolve Wealth Partners monitors the investments recommended by Michael S. Israel to ensure they are suitable

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for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Revolve Wealth Partners periodically reviews the advisory activities of Michael S. Israel, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Michael S. Israel.

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## LOGAN M. TRENZ

411 Hackensack Avenue, Suite 1005  
Hackensack, NJ 07601

(877) 724-5697

This Brochure Supplement provides information about Logan M. Trenz that supplements the Disclosure Brochure of Revolve Wealth Partners, LLC (hereinafter "Revolve Wealth Partners"), a copy of which you should have received. Please contact Revolve Wealth Partners's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Logan M. Trenz is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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[www.revolvewealth.com](http://www.revolvewealth.com)

## Item 2. Educational Background and Business Experience

Born 1986

### Post-Secondary Education

University of Delaware | B.S., Marketing and International Business and Philosophy | 2008

### Recent Business Background

Revolve Wealth Partners, LLC | Investment Adviser Representative | April 2017 – Present

Purshe Kaplan Sterling Investments, Inc. | Registered Representative | April 2017 – Present

Oppenheimer & Co, Inc. | Investment Adviser Representative | June 2010 – April 2017

Oppenheimer & Co, Inc. | Registered Representative | March 2010 – April 2017

## Item 3. Disciplinary Information

Revolve Wealth Partners is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Logan M. Trenz. Revolve Wealth Partners has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

Revolve Wealth Partners is required to disclose information regarding any investment-related business or occupation in which Logan M. Trenz is actively engaged.

### Registered Representative of a Broker-Dealer

Logan M. Trenz is a registered representative of Purshe Kaplan Sterling Investments, Inc. ("*PKS*"), an SEC registered broker-dealer and member of FINRA. In this capacity, Logan M. Trenz may provide securities brokerage services and implement securities transactions under a commission based arrangement. Logan M. Trenz may be entitled to a portion of the brokerage commissions paid to *PKS*, as well as a share of any ongoing distribution or service ("trail") fees from the sale of mutual funds.

A conflict of interest exists to the extent that Logan M. Trenz recommends the purchase of securities where he receives commissions or other additional compensation as a result. This practice may give him an incentive to recommend investment products based on compensation received rather than on the client's needs. Revolve Wealth Partners has procedures in place to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned. For certain accounts covered by ERISA (and such others that the firm deems appropriate), Revolve Wealth Partners

provides investment advisory services on a fee offset basis, whereby the firm reduces its fee by an amount equal to the aggregate commissions and 12b-1 fees earned by Logan M. Trenz in his individual capacity as a registered representative of *PKS*.

### **Licensed Insurance Agent**

Logan M. Trenz is a licensed insurance agent and in such capacity may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that Revolve Wealth Partners recommends the purchase of insurance products where Logan M. Trenz receives insurance commissions or other additional compensation. Revolve Wealth Partners seeks to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned.

### **Item 5. Additional Compensation**

Revolve Wealth Partners is required to disclose information regarding any arrangement under which Logan M. Trenz receives an economic benefit from someone other than a client for providing investment advisory services. Revolve Wealth Partners has no information to disclose in relation to this Item.

### **Item 6. Supervision**

Michael S. Israel and Daniel L. Katz, Managing Members, are generally responsible for supervising Logan M. Trenz's advisory activities on behalf of Revolve Wealth Partners. Michael S. Israel and Daniel L. Katz can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

Revolve Wealth Partners supervises its personnel and the investments made in client accounts. Revolve Wealth Partners monitors the investments recommended by Logan M. Trenz to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Revolve Wealth Partners periodically reviews the advisory activities of Logan M. Trenz, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Logan M. Trenz.

# Brochure Supplement

APRIL 9, 2018



## **JOSHUA M. JOFFE**

411 Hackensack Avenue, Suite 1005  
Hackensack, NJ 07601

(877) 724-5697

This Brochure Supplement provides information about Joshua M. Joffe that supplements the Disclosure Brochure of Revolve Wealth Partners, LLC (hereinafter "Revolve Wealth Partners"), a copy of which you should have received. Please contact Revolve Wealth Partners's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Joshua M. Joffe is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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411 Hackensack Avenue, Suite 1005, Hackensack, NJ 07601 | (877) 724-5697  
[www.revolvewealth.com](http://www.revolvewealth.com)

## Item 2. Educational Background and Business Experience

Born 1981

### Post-Secondary Education

NYU Stern School of Business | MBA., Finance, Economics, Financial Instruments & Markets | 2013

Brandeis University | BA., English & American Literature | 2003

### Recent Business Background

Revolve Wealth Partners, LLC | Director of Investments & Investment Adviser Representative | April 2018 – Present

Altfest Personal Wealth Management | Managing Advisor | October 2013 – April 2018

AllianceBernstein | Senior Associate Portfolio Manager | February 2008 – October 2013

### Professional Designation

Joshua M. Joffe holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

For additional information about this credential, please refer directly to the website of the issuing organization.

## Item 3. Disciplinary Information

Revolve Wealth Partners is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Joshua M. Joffe. Revolve Wealth Partners has no information to disclose in relation to this Item.

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

Revolve Wealth Partners is required to disclose information regarding any investment-related business or occupation in which Joshua M. Joffe is actively engaged. Revolve Wealth Partners has no information to disclose in relation to this Item.

### **Item 5. Additional Compensation**

Revolve Wealth Partners is required to disclose information regarding any arrangement under which Joshua M. Joffe receives an economic benefit from someone other than a client for providing investment advisory services. Revolve Wealth Partners has no information to disclose in relation to this Item.

### **Item 6. Supervision**

Logan M. Trenz, Chief Compliance Officer, is generally responsible for supervising Joshua M. Joffe's advisory activities on behalf of Revolve Wealth Partners. Logan M. Trenz can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

Revolve Wealth Partners supervises its personnel and the investments made in client accounts. Revolve Wealth Partners monitors the investments recommended by Joshua M. Joffe to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Revolve Wealth Partners periodically reviews the advisory activities of Joshua M. Joffe, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Joshua M. Joffe.

# Brochure Supplement

December 17, 2018

## John E. Tevnan

411 Hackensack Avenue, Suite 1005  
Hackensack, NJ 07601

(201) 373-2163

This Brochure Supplement provides information about John E. Tevnan that supplements the Disclosure Brochure of Revolve Wealth Partners, LLC (hereinafter "Revolve Wealth Partners"), a copy of which you should have received. Please contact Revolve Wealth Partners's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about John E. Tevnan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Revolve Wealth Partners, LLC, a Registered Investment Adviser**

411 Hackensack Avenue, Suite 1005, Hackensack, NJ 07601 | (201) 373-2163  
[www.revolvewealth.com](http://www.revolvewealth.com)

## Item 2. Educational Background and Business Experience

Born 1994

### Post-Secondary Education

Bryant University | BS, Finance | 2016

### Recent Business Background

Revolve Wealth Partners, LLC | Business Solutions Manager | September 2018 – Present

John Hancock | Sales Consultant | August 2016 – September 2018

## Item 3. Disciplinary Information

Revolve Wealth Partners is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of John E. Tevnan. Revolve Wealth Partners has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

Revolve Wealth Partners is required to disclose information regarding any investment-related business or occupation in which John E. Tevnan is actively engaged. Revolve Wealth Partners has no information to disclose in relation to this Item.

## Item 5. Additional Compensation

Revolve Wealth Partners is required to disclose information regarding any arrangement under which John E. Tevnan receives an economic benefit from someone other than a client for providing investment advisory services. Revolve Wealth Partners has no information to disclose in relation to this Item.

## Item 6. Supervision

Logan M. Trenz, Chief Compliance Officer, is generally responsible for supervising John E. Tevnan's advisory activities on behalf of Revolve Wealth Partners. Logan M. Tranz can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

Revolve Wealth Partners supervises its personnel and the investments made in client accounts. Revolve Wealth Partners monitors the investments recommended by John E. Tevnan to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as

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well as any restrictions previously requested by the client. Revolve Wealth Partners periodically reviews the advisory activities of John E. Tevnan, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by John E. Tevnan.