

# 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 – October 2020

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.

### **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 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.

# Brochure Supplement

APRIL 28, 2017



## **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).

**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 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 – October 2020

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.

### **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 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.

# Brochure Supplement

APRIL 28, 2017



## 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).

**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 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- Oct. 2020

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.

### 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).

**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 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

Altvest 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.

*This brochure supplement provides information about Amy Brackett that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Amy Brackett if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

**Revolve Wealth Partners, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**Amy Brackett**  
Personal CRD Number: 4214852  
Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[amy.brackett@revolvewealth.com](mailto:amy.brackett@revolvewealth.com)

UPDATED: 09/12/2024

## **Item 2: Educational Background and Business Experience**

**Name:** Amy Brackett **Born:** 1979

### **Educational Background and Professional Designations:**

#### **Education:**

BSBA Finance and Accounting, Washington University in St. Louis – 2001

#### **Designations:**

##### **CFA – Chartered Financial Analyst**

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute - the largest global association of investment professionals.

There are currently more than 90,000 CFA charter holders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

##### **High Ethical Standards**

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charter holders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

##### **Global Recognition**

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

### **Comprehensive and Current Knowledge**

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) 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:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – 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 planning field; and

ii. Ethics – 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

03/2021 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
03/2021 - 04/2021	Senior Wealth Advisor Revolve Wealth Partners
05/2007 - 03/2021	Director and Senior Advisor Klingenstein Fields Advisors

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

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**

Amy Brackett is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Amy Brackett does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.



## **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Amy Brackett is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Amy Brackett adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.

*This brochure supplement provides information about Daniel Miller Kimeldorf that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Daniel Miller Kimeldorf if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

**Revolve Wealth Partners, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**Daniel Miller Kimeldorf**  
Personal CRD Number: 7320603  
Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[daniel.kimeldorf@revolvewealth.com](mailto:daniel.kimeldorf@revolvewealth.com)

UPDATED: 12/21/2020

## Item 2: Educational Background and Business Experience

**Name:** Daniel Miller Kimeldorf

**Born:** 1989

### **Educational Background and Professional Designations:**

#### **Education:**

BA Economics, University of Chicago - 2010

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) 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:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – 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 planning field; and
- ii. Ethics – 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

## **CFA – Chartered Financial Analyst**

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute - the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

### **High Ethical Standards**

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

### **Global Recognition**

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

### **Comprehensive and Current Knowledge**

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

### **Business Background:**

11/2020 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
11/2020 - Present	Senior Wealth Advisor Revolve Wealth Partners
10/2013 - 11/2020	Associate Managing Advisor Altfest Personal Wealth Management
06/2011 - 10/2013	Analyst Hall Capital Partners
09/2007 - 06/2011	NA Student

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

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**

Daniel Miller Kimeldorf is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Daniel Miller Kimeldorf does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

### **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Daniel Miller Kimeldorf is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Daniel Miller Kimeldorf adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.

*This brochure supplement provides information about Jake Matell Steinberg that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Jake Matell Steinberg if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **Revolve Wealth Partners, LLC**

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

*for*

### **Jake Matell Steinberg**

Personal CRD Number: 7073161

Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[jake.steinberg@revolvewealth.com](mailto:jake.steinberg@revolvewealth.com)

UPDATED: 12/18/2024

## Item 2: Educational Background and Business Experience

**Name:** Jake Matell Steinberg      **Born:** 1996

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelor Finance, University of Maryland - 2018

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The individual has been certified for financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, the individual may be referred to as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and 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.



## **Business Background:**

01/2021 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
01/2019 - 01/2021	Analyst Revolve Wealth Partners
05/2018 - 01/2019	Unemployed Unemployed
08/2014 - 05/2018	Student Student
01/2011 - 06/2014	NA Student

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

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**

Jake Matell Steinberg is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Jake Matell Steinberg does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

### **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Jake Matell Steinberg is supervised by Logan M. Trenz, the firm's Chief Compliance Officer. Logan M. Trenz is responsible for ensuring

that Jake Matell Steinberg adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan M. Trenz is (201) 373-2163.

*This brochure supplement provides information about Jack Ryan Baron that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Jack Ryan Baron if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

**Revolve Wealth Partners, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**Jack Ryan Baron**  
Personal CRD Number: 7645938  
Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[jack.baron@revolvewealth.com](mailto:jack.baron@revolvewealth.com)

UPDATED: 10/12/2022

## Item 2: Educational Background and Business Experience

**Name:** Jack Ryan Baron      **Born:** 1999

### Educational Background and Professional Designations:

#### Education:

Bachelor of Science Economics, University of Wisconsin-Madison - 2021

#### Business Background:

10/2022 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
07/2022 - Present	Jr. Investment Analyst Revolve Wealth Partners
08/2021 - 03/2022	Quality Manager Epic
09/2004 - 05/2021	NA Student

## Item 3: Disciplinary Information

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

Jack Ryan Baron is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Jack Ryan Baron does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

### **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Jack Ryan Baron is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Jack Ryan Baron adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.

*This brochure supplement provides information about Steve Ellis Garrett that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Steve Ellis Garrett if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

**Revolve Wealth Partners, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**Steve Ellis Garrett**  
Personal CRD Number: 7770722  
Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[steve.garrett@revolvewealth.com](mailto:steve.garrett@revolvewealth.com)

UPDATED: 06/20/2023

## Item 2: Educational Background and Business Experience

**Name:** Steve Ellis Garrett

**Born:** 1966

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelor of Science Marketing, University of Maryland - 1988

#### **Business Background:**

03/2023 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
01/2014 - Present	Insurance Broker VIA Insurance & Financial Services
03/2009 - 12/2013	Insurance Broker Rampart Insurance

## Item 3: Disciplinary Information

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

Steve Ellis Garrett is a licensed insurance agent. This activity creates a conflict of interest since there is an incentive to recommend insurance products based on commissions or other benefits received from the insurance company, rather than on the client's needs. Additionally, the offer and sale of insurance products by supervised persons of RWPL are not made in their capacity as a fiduciary, and products are limited to only those offered by certain insurance providers. RWPL addresses this conflict of interest by requiring its supervised persons to act in the best interest of the client at all times, including when acting as an insurance agent. RWPL periodically reviews recommendations by its supervised persons to assess whether they are based on an objective

evaluation of each client's risk profile and investment objectives rather than on the receipt of any commissions or other benefits. RWPL will disclose in advance how it or its supervised persons are compensated and will disclose conflicts of interest involving any advice or service provided. At no time will there be tying between business practices and/or services (a condition where a client or prospective client would be required to accept one product or service conditioned upon the selection of a second, distinctive tied product or service). No client is ever under any obligation to purchase any insurance product. Insurance products recommended by RWPL's supervised persons may also be available from other providers on more favorable terms, and clients can purchase insurance products recommended through other unaffiliated insurance agencies.

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

Steve Ellis Garrett does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

### **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Steve Ellis Garrett is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Steve Ellis Garrett adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.



*This brochure supplement provides information about Robert Biesiada that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Robert Biesiada if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

# **Revolve Wealth Partners, LLC**

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

*for*

**Robert Biesiada**

Personal CRD Number: 7814067

Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue,  
Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[robert.biesiada@revolvewealth.com](mailto:robert.biesiada@revolvewealth.com)

UPDATED: 09/29/2023

## Item 2: Educational Background and Business Experience

**Name:** Robert Biesiada      **Born:** 1982

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelors Business, Berkeley College - 2003

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) 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:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – 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 planning field; and
- ii. Ethics – 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

09/2023 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
10/2021 - Present	Financial Planning Specialist Revolve Wealth Partners
01/2017 - 10/2021	Manager Mr. Fix-All
01/2005 - 12/2016	Operations Manager Biofoods Ltd

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

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**

Robert Biesiada is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Robert Biesiada does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

### **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Robert Biesiada is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Robert Biesiada adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.

*This brochure supplement provides information about Megan Gruszczynski that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Megan Gruszczynski if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

**Revolve Wealth Partners, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**Megan Gruszczynski**  
Personal CRD Number: 7055173  
Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue, Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[megan@revolvewealth.com](mailto:megan@revolvewealth.com)

UPDATED: 02/27/2025

## Item 2: Educational Background and Business Experience

**Name:** Megan Gruszczynski      **Born:** 1986

### **Educational Background and Professional Designations:**

#### **Education:**

B. A., Sociology, Ramapo College of New Jersey - 2012

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) 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:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – 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 planning field; and
- ii. Ethics – 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

02/2025 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
04/2018 - Present	Financial Planning Specialist Revolve Wealth Partners, LLC
07/2014 - 04/2018	Associate Project Director Russell Research

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

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**

Megan Grusczyński is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Megan Grusczyński does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

## **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Megan Gruszczynski is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Megan Gruszczynski adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.



*This brochure supplement provides information about Isaac Claar that supplements the Revolve Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact Isaac Claar if you did not receive Revolve Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

**Revolve Wealth Partners, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*  
**Isaac Claar**  
Personal CRD Number: 7404202  
Investment Adviser Representative

Revolve Wealth Partners, LLC  
411 Hackensack Avenue Suite 1005  
Hackensack, NJ 07601  
(201) 373-2163  
[isaac.claar@revolvewealth.com](mailto:isaac.claar@revolvewealth.com)

UPDATED: 06/18/2025

## Item 2: Educational Background and Business Experience

**Name:** Isaac Claar      **Born:** 2001

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelors of Science Personal Finance, University of Wisconsin-Madison - 2023

#### **Designations:**

#### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) 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:

- Education – 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). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – 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 planning field; and

ii. Ethics – 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

07/2023 - Present	Investment Adviser Representative Revolve Wealth Partners, LLC
07/2023 - Present	Relationship Coordinator Revolve Wealth Partners
07/2013 - 07/2023	Student Student

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

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**

Isaac Claar is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Isaac Claar does not receive any economic benefit from any person, company, or organization, other than Revolve Wealth Partners, LLC in exchange for providing clients advisory services through Revolve Wealth Partners, LLC.

## **Item 6: Supervision**

As a representative of Revolve Wealth Partners, LLC, Isaac Claar is supervised by Logan Trenz, the firm's Chief Compliance Officer. Logan Trenz is responsible for ensuring that Isaac Claar adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan Trenz is (201) 373-2163.