March 11, 2025

Investment Adviser Brochure Supplement [ADV 2B]

David P. Jordan CFP® ChFC®

Investment Adviser Representative (IAR)
CRD No. 2348335

Item 1 Name and Address of Firm

Registered as	Independent Wealth Management LLC
Doing business as (dba)	Jordan Financial Life Planning
Central Records Depository (CRD)	No. 146633
Managing Member	David P. Jordan, CFP®, ChFC®
Only place of business	Old Elm Executive Park 6123 Green Bay Road, Suite 200 Kenosha, WI 53142
Office Telephone	(262) 656-1141
Business Email	info@jordanfinancial.biz
Website	www.jordanfinancial.biz
Additional information	www.adviserinfo.sec.gov

Item 2 Educational Background and Business Experience

David P. Jordan CFP® ChFC®

Born in 1959, Mr. Jordan earned his Bachelor of Theology degree from the Lutheran Seminary in Adelaide, Australia, in. He entered the financial services profession in 1993, working for Aid Association for Lutherans (later known as Thrivent Financial for Lutherans) as a Financial Consultant until 2005. He founded Jordan Financial Life Planning with his business partner, Terry Backmann, in 2005, with the firm taking its form as a limited liability company under the laws of Wisconsin in 2007 as Independent Wealth Management LLC.

Mr. Jordan holds the professional designations of CERTIFIED FINANCIAL PLANNER™ (2001); Chartered Financial Consultant® (1999); Chartered Life Underwriter® (1999). He is registered with the Financial Industry Regulatory Authority (FINRA) as an Investment Adviser Representative of Jordan Financial Life Planning.

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Item 3 Disciplinary Information

There are no legal or disciplinary events or actions by any state, federal or self-regulatory authority, actual or pending.

Item 4 Other Business Activities

Apart from the investment advisory business, Terry is not actively engaged in another business.

Item 5 Additional Compensation

We are compensated by advisory fees that you pay directly to us as authorized through a financial planning or investment management agreement when you hire our firm. We do not contract with third-parties, or from within our firm itself, for sales awards, bonuses, other prizes or economic benefits for reaching a quota of sales (we do not "sell"), referrals, or new accounts.