

Investment Adviser Brochure Supplement [ADV 2B]

Terry L. Backmann, EA, ChFC®

Investment Adviser Representative (IAR)

CRD No. 4717131

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

Terry L. Backmann, EA, ChFC®

Born in 1956, Ms. Backmann earned a bachelor's degree in journalism and communications from the University of Wisconsin-Oshkosh in 1978. She has completed studies towards a Master of Business Administration Degree through Keller Graduate School of Management in Milwaukee, WI. Ms. Backmann entered the financial services profession in 2004, working for Thrivent Financial for Lutherans as a Financial Associate.



She joined Mr. Jordan in 2005 to become a founding member of Jordan Financial Life Planning. Ms. Backmann is now working part-time with the firm to better prepare for a well-earned retirement while serving client needs as a financial adviser.

Ms. Backmann earned the professional designations of Chartered Financial Consultant® (2012); and Enrolled Agent (2012). She is registered with FINRA as an Investment Adviser Representative of Jordan Financial Life Planning.

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.