

Item 1 Cover Sheet

INFORMATIONAL BROCHURE SUPPLEMENT

Form ADV Part 2B

**SSB WEALTH MANAGEMENT, INC.
D/B/A**

REMBERT PENDLETON JACKSON

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June 16, 2026

This brochure supplement (“Supplement”) provides information about Newton G. Pendleton II, Charles E. Rembert, Dwayne A. Jackson, Leslie D. Irby, Brett W. Roper, Elizabeth D. Verdi, Elizabeth S. Clough, David S. Tebor, Daniel E. Jackson, John K. Wolff, Daniel J. Larrabee, Bob B. Amoako, Payton A. Rembert, Jeffrey Canavan, and Tyler Morris that supplements the SSB Wealth Management, Inc. d/b/a Rembert Pendleton Jackson (“RPJ”) Form ADV Part 2A brochure (“Brochure”). As a client or prospect, you should have received a copy of that brochure. Please contact RPJ at a (703) 821-6655 if you did not receive RPJ’s Brochure, or if you have any questions about the contents of this Supplement.

Additional information about the supervised persons mentioned above is also available on the SEC’s website at www.AdviserInfo.sec.gov.

Professional Designations

Chartered Financial Analyst

To earn a CFA charter, you must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program.

The CFA Program is organized into three levels, each culminating in a six-hour exam. Completing the Program takes most candidates between two and five years (there is no limit to the number of times you can take each exam), but you can take as long as you need to complete the program. The Program reflects a broad Candidate Body of Knowledge™ (CBOK) developed and continuously updated by active practitioners to ensure that charterholders possess knowledge grounded in the real world of today's global

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. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

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, administered in 10 hours over a two-day period, 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:

- 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
- 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.

Certified Investment Management Analyst

The Certified Investment Management Analyst® (CIMA®) certification identifies individuals who have met extensive experience and ethical requirements and successfully completed advanced investment management consulting coursework provided through The Wharton School, University of Pennsylvania, The University of Chicago Booth School of Business, or the Carnegie Mellon Tepper School of Business. The certification is delivered by the Investment Management Consultants Association® (IMCA®).

CIMA® professionals must pass a qualification exam and a certification exam covering a wide range of in-depth investment topics. Additionally, those who earn the certification must agree to meet ongoing continuing education requirements, and adhere to IMCA’s Code of Professional Responsibility and Standards of Practice. In 2011, the American National Standards Institute (ANSI) recognized CIMA® certification as the first financial services credential in the United States to earn accreditation under an international personnel certification standard. ANSI is a private nonprofit organization that provides third-party accreditation services and oversees a broad array of standards development processes in the United States.

Every CIMA® certificant must successfully complete the following requirements:

- Demonstrate at least three years of experience in the investment management consulting or financial services industry
- Pass a background check and qualification exam
- Complete an educational program and certification examination from a top-25 business school

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

- Continuing Education – Complete 40 hours of continuing education every two years, including two hours on ethics and other parts of the Code of Professional Responsibility and Standards of Practice, to maintain competence and meet high standards of professionalism in a changing financial world; and
- Ethics – agree to continued adherence to IMCA’s Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Mark.

Certified Divorce Financial Analyst

The Certified Divorce Financial Analyst (CDFA®) Program is designed to prepare you as an expert on the financial aspects of divorce. The role of a CDFA® professional is to address the special financial issues of divorce with data to help achieve equitable settlements.

Prerequisites

- Divorce Financial Planning is the application of the discipline of financial planning to settlement strategies in divorce. The process requires the synthesis of tax, insurance, retirement and other areas of knowledge with their specific application to divorce. The eligibility requirements were established by the Board of Advisors and reflect the fact that this is not an entry-level designation but an advanced program.
- Individuals with a minimum of three years of professional experience in finance or divorce and a Bachelor’s degree are eligible to enroll in the CDFA® Program. IDFA will accept ten years of professional experience from those candidates that do not have a Bachelor's degree. This includes experience as a financial professional, accountant, or matrimonial lawyer. Candidates should also have working knowledge of financial calculators before purchasing the program.

Ethics

- CDFA practitioners agree to abide by a strict code of professional conduct known as the IDFA Code of Ethics and Professional Responsibility, which sets forth their ethical responsibilities to the public, clients, employers and other professionals. The IDFA may perform a background check during this process and each CDFA candidate must disclose any investigations or legal proceedings relating to his or her professional or business conduct.

CDFA Certification Requirements

- CDFA practitioners are required to maintain technical competence and to fulfill ethical obligations. Practitioners must pay an annual reinstatement fee. Every two years, they must complete a minimum of fifteen (30) hours of continuing education specifically related to the field of divorce.
- In addition to the biennial continuing education requirement, all CDFA practitioners must voluntarily disclose any public, civil, criminal, or disciplinary actions that may have been taken against them during the past two years as part of the renewal process.

Accredited Investment Fiduciary

The Accredited Investment Fiduciary (AIF®) designation is issued by the Center for Fiduciary Studies. AIF®'s must satisfy a point-based threshold based on a combination of education, relevant industry experience, and professional development. Additionally, candidates must complete a web-based or capstone program and receive a passing score on a certification exam. AIF®'s must complete 6 hours of continuing education every year.

Retirement Income Certified Professional

The RICP® (Retirement Income Certified Professional®) is a professional designation awarded by The American College of Financial Services to advisors who have completed advanced training specifically focused on retirement income planning. This credential indicates that an advisor has specialized knowledge in creating sustainable income streams, managing longevity risk, and optimizing Social Security benefits.

To earn the RICP® designation, financial advisors must meet specific educational and experience requirements:

- Educational Requirements: Completion of three courses and exams covering topics such as retirement income strategies, investment planning, and long-term care.
- Experience: Have three years of experience in financial planning or related profession.
- Ethics: Agree to comply with the American College Code of Ethics and Procedures.

Continuing Education

- Client-facing designees will be required to complete 30 hours of CE every two years. At least one hour of ethics CE will be required.
- Recommit to The American College of Financial Services standard of ethics.

Item 2 – Educational Background and Business Experience

Newton G. Pendleton III (year of birth 1964) serves as Relationship Manager of RPJ.

Educational Background

- St. Lawrence University, Bachelor of Arts in Economics, 1986

Business Experience

- RPJ, Relationship Manager January 2020 – Present, President January 2020 – January 2025
- Rembert Pendleton Jackson, Principal, March 1990 – January 2020

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Mr. Pendleton has no legal or disciplinary events that would be material to a client's evaluation of Mr. Pendleton or RPJ.

Item 4 – Other Business Activities

Mr. Pendleton is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Pendleton does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Pendleton's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Pendleton's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Charles E. Rembert (year of birth 1969) serves as CEO and Relationship Manager of RPJ.

Education Background

- McDaniel College, Bachelor of Arts in Business Administration, 1991

Business Experience

- RPJ, CEO and Relationship Manager, January 2020 – Present
- Rembert Pendleton Jackson, Principal, January 1995 – January 2020

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Mr. Rembert has no legal or disciplinary events that would be material to a client's evaluation of Mr. Rembert or RPJ.

Item 4 – Other Business Activities

Mr. Rembert is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Rembert does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Rembert is currently Chief Executive Officer of RPJ. Rembert's activities are overseen by the Chief Compliance Officer, Anh N. Lam and are also overseen by the President, Newton G. Pendleton III. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Dwayne A. Jackson (year of birth 1962) serves as Relationship Manager of RPJ.

Educational Background

- College of William and Mary, Bachelor of Business Administration in Accounting, 1985

Business Experience

- RPJ, Relationship Manager, January 2020 – Present
- Rembert Pendleton Jackson, Principal, January 2001 – January 2020

Item 3 – Disciplinary Information

Mr. Jackson has no legal or disciplinary events that would be material to a client's evaluation of Mr. Jackson or RPJ.

Item 4 – Other Business Activities

Mr. Jackson is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Jackson does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Jackson's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Jackson's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Leslie D. Irby (year of birth 1950) serves as Relationship Manager of RPJ.

Educational Background

- University of Texas in Austin, Bachelor of Arts in Mathematics, 1972

Business Experience

- RPJ, Relationship Manager, January 2020 – Present
- Rembert Pendleton Jackson, Principal, May 2007 – January 2020
- Vista Information Technologies, Sales Manager, November 2000 – October 2007
- Rembert, D’Orazio & Fox, Solicitor, April 1994 – May 2007
- Bionetrix, Sales Manager, November 1998 – November 2000

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Mr. Irby has no legal or disciplinary events that would be material to a client’s evaluation of Mr. Irby or RPJ.

Item 4 – Other Business Activities

Mr. Irby is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Irby does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Irby’s investment recommendations are supervised by RPJ’s Chief Executive Officer, Charles E. Rembert. Mr. Irby activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Brett W. Roper (year of birth 1980) serves as President and Relationship Manager of RPJ.

Educational Background

- Virginia Polytechnic Institute and State University, Bachelor of Science focused in Family Financial Management, 2004

Business Experience

- RPJ, President, January 2025 – Present, Relationship Manager, January 2020 – Present
- Rembert Pendleton Jackson, Principal, June 2004 – January 2020

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Mr. Roper has no legal or disciplinary events that would be material to a client's evaluation of Mr. Roper or RPJ.

Item 4 – Other Business Activities

Mr. Roper is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Roper does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Roper's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Roper's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Elizabeth D. Verdi (year of birth 1981) serves as Relationship Manager of RPJ.

Educational Background

- Virginia Polytechnic Institute and State University, Bachelor of Sciences degree with a concentration in Family Financial Management, 2003

Business Experience

- RPJ, Relationship Manager, January 2020 – Present
- Rembert Pendleton Jackson, Principal, May 2011 – January 2020
- Girard Securities, Inc., Registered Administrative Assistance, February 2006 – May 2011
- United Capital Financial Advisers, Case Manager, January 2006 – May 2011

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary
- Certified Divorce Financial Analyst

Item 3 – Disciplinary Information

Ms. Verdi has no legal or disciplinary events that would be material to a client's evaluation of Ms. Verdi or RPJ.

Item 4 – Other Business Activities

Ms. Verdi is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Ms. Verdi does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Ms. Verdi's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Ms. Verdi's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Elizabeth S. Clough (year of birth 1979) serves as Relationship Manager of RPJ.

Educational Experience

- University of Vermont, Bachelor of Arts in Political Science, 2001

Business Background

- RPJ, Relationship Manager, January 2020 – Present
- Rembert Pendleton Jackson, Principal, October 2011 – January 2020
- Highline Wealth Management, Representative, April 2011 – September 2011
- Independence Wealth Advisors, Inc., Associate Advisor, January 2007 – March 2011

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Ms. Clough has no legal or disciplinary events that would be material to a client's evaluation of Ms. Clough or RPJ.

Item 4 – Other Business Activities

Ms. Clough is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Ms. Clough does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Ms. Clough's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Ms. Clough's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

David S. Tebor (year of birth 1996) serves as Financial Advisor of RPJ.

Educational Background

- Virginia Polytechnic Institute and State University, Bachelor of Science in Finance, 2019

Business Experience

- RPJ, Financial Advisor, September 2025 – Present, Associate Relationship Manager, November 2022 – September 2025
- RPJ, Senior Financial Planner, January 2020 – November 2022
- Rembert Pendleton Jackson, Associate Planner, July 2019 – January 2020

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Mr. Tebor has no legal or disciplinary events that would be material to a client's evaluation of Mr. Tebor or RPJ.

Item 4 – Other Business Activities

Mr. Tebor is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Tebor does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Tebor's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Tebor's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Daniel E. Jackson (year of birth 1992) serves as Financial Advisor of RPJ.

Educational Background

- Clemson University, Bachelor of Science in Financial Management, 2014

Business Experience

- RPJ, Financial Advisor, September 2025 – Present, Associate Relationship Manager, November 2022 – September 2025
- RPJ, Senior Financial Planner, January 2020 – November 2022
- Rembert Pendleton Jackson, Associate Planner, January 2017 – January 2020
- NYLife Securities LLC, Registered Representative, December 2014 – January 2017
- New York Life Insurance Company, Agent, July 2014 – January 2017

Professional Designations

- Certified Financial Planner

Item 3 – Disciplinary Information

Mr. Jackson has no legal or disciplinary events that would be material to a client's evaluation of Mr. Jackson or RPJ.

Item 4 – Other Business Activities

Mr. Jackson is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Jackson does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Jackson's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Jackson's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

John K. Wolff (year of birth 1989) serves as Financial Advisor of RPJ.

Educational Background

- James Madison University, Bachelor of Science in Cultural Anthropology, 2014

Business Experience

- RPJ, Financial Advisor, September 2025 – Present, Associate Relationship Manager, November 2022 – September 2025
- RPJ, Senior Financial Planner, January 2020 – November 2022
- Rembert Pendleton Jackson, Associate Planner, May 2017 – January 2020
- North End Financial, Financial Planning Associate, October 2014 – May 2017

Professional Designations

- Certified Financial Planner
- Accredited Investment Fiduciary
- Certified Investment Management Analyst

Item 3 – Disciplinary Information

Mr. Wolff has no legal or disciplinary events that would be material to a client's evaluation of Mr. Wolff or RPJ.

Item 4 – Other Business Activities

Mr. Wolff is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Wolff does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Wolff's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Wolff's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Daniel J. Larrabee (year of birth 1997) serves as Financial Advisor of RPJ.

Educational Background

- Virginia Polytechnic Institute and State University, Bachelor of Science in Finance, 2019

Business Experience

- RPJ, Financial Advisor, September 2025 – Present, Associate Relationship Manager, September 2023 – September 2025
- RPJ, Financial Planner, April 2021 – September 2023
- Bogart Wealth, Client Services Associate , June 2019 – April 2020

Professional Designations

- *Certified Financial Planner*
- Accredited Investment Fiduciary

Item 3 – Disciplinary Information

Mr. Larrabee has no legal or disciplinary events that would be material to a client's evaluation of Mr. Larrabee or RPJ.

Item 4 – Other Business Activities

Mr. Larrabee is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Larrabee does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Larrabee's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Larrabee's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Bob B. Amoako (year of birth 1998) serves as Financial Advisor of RPJ.

Educational Background

- Virginia Polytechnic Institute and State University, Bachelor of Science in Business, 2021
- Northern Virginia Community College, Associate of Science in Business Administration, 2018

Business Experience

- RPJ, Financial Advisor, June 2026 – Present, Financial Planner, August 2023 – June 2026
- AFS 401(k) Retirement Services, Client Service Associate, January 2022 – May 2023

Professional Designations

- Certified Financial Planner
- Retirement Income Certified Professional

Item 3 – Disciplinary Information

Mr. Amoako has no legal or disciplinary events that would be material to a client's evaluation of Mr. Amoako or RPJ.

Item 4 – Other Business Activities

Mr. Amoako is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Amoako does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Amoako's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Amoako's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Payton A. Rembert (year of birth 1999) serves as Financial Planner of RPJ.

Educational Background

- University of Richmond, B.S.B.A - Finance and Economics, 2020

Business Experience

- RPJ, Financial Planner, March 2025 – Present

Item 3 – Disciplinary Information

Mr. Rembert has no legal or disciplinary events that would be material to a client's evaluation of Mr. Rembert or RPJ.

Item 4 – Other Business Activities

Mr. Rembert is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Rembert does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Rembert's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Rembert's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Jeffrey Canavan (year of birth 1970) serves as Director of Investments of RPJ.

Educational Background

- University of Pittsburgh, B.S. – Business Administration, 1993

Business Experience

- RPJ, Director of Investments, May 2025 – Present
- MissionSquare Retirement, Director of Investments, 2009 - 2025

Professional Designations

- Chartered Financial Analyst

Item 3 – Disciplinary Information

Mr. Canavan has no legal or disciplinary events that would be material to a client's evaluation of Mr. Canavan or RPJ.

Item 4 – Other Business Activities

Mr. Canavan is not engaged in any other investment related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Canavan does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Canavan's investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Rembert's activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.

Item 2 – Educational Background and Business Experience

Tyler T. Morris (year of birth 2003) serves as Financial Planner of RPJ.

Educational Background

- Virginia Polytechnic Institute and State University, Bachelor of Science in Finance, 2025

Business Experience

- RPJ, Financial Planner, June 2025 – Present

Item 3 – Disciplinary Information

Mr. Morris has no legal or disciplinary events that would be material to a client's evaluation of Mr. Morris or RPJ.

Item 4 – Other Business Activities

Mr. Morris is not engaged in any other investment-related business and does not receive compensation in connection with any business activity outside of RPJ.

Item 5 – Additional Compensation

Mr. Morris does not receive any additional compensation or economic benefit for providing advisory services to someone who is not a client.

Item 6 – Supervision

Mr. Morris' investment recommendations are supervised by RPJ's Chief Executive Officer, Charles E. Rembert. Mr. Morris' activities are overseen by the Chief Compliance Officer, Anh N. Lam. Any of these individuals can be reached directly at (703) 821-6655.