

CATHERINE CAVALIER JACKSON

1 Park Place, Office Building 1, Ste 500
Annapolis, Maryland 21401

(410) 934-1301
04/10/2023

This Brochure Supplement provides information about Catherine Cavalier Jackson that supplements the Disclosure Brochure of Marks Wealth, LLC (hereinafter "Marks Wealth Management"), a copy of which you should have received. Please contact Marks Wealth Management'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 Catherine Cavalier Jackson is available on the SEC's website at www.adviserinfo.sec.gov.

Marks Wealth, LLC, a Registered Investment Adviser

1 Park Place, Office Building 1, Ste 500, Annapolis, Maryland 21401 | (410) 934-1199

Item 2. Educational Background and Business Experience

Born 1993

Post-Secondary Education

Towson University | B.S., Marketing | 2016

Recent Business Background

Marks Wealth, LLC | Investment Adviser Representative | September 2020– Present

Wells Fargo Advisors, LLC | Registered Client Associate | March 2016 – September 2020

Professional Designation

Catherine Cavalier Jackson 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.

AIF® - Accredited Investment Fiduciary®

- The AIF designation, awarded by the Center for Fiduciary Studies, an fi360 company, demonstrates the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence.
- AIF designees must complete 6 steps to earn the designation: 1. submit registration and fee; 2. successfully complete a specialized program on investment fiduciary standards of care; 3. pass a comprehensive examination; 4. upon passing, submit the accreditation application and fee; 5. complete annual continuing educational requirements; 6. pledge to abide by the designation’s code of ethics.

RSSA – Registered Social Security Analyst

- The RSSA designation, awarded by the Nation Association of Registered Social Security Analysts Ltd. and demonstrates the focus on all components of Social Security benefits and Comprehensive Retirement Planning.
- RSSA designees are required to take 4 credits in continuing education every calendar year

Registered Membership in NARSSA is required to continue use of the RSSA credential.

Item 3. Disciplinary Information

Marks Wealth Management is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Catherine Cavalier Jackson. Marks Wealth Management has no information to disclose in relation to this Item.

Item 4. Other Business Activities

Marks Wealth Management is required to disclose information regarding any investment-related business or occupation in which Catherine Cavalier Jackson is actively engaged. Marks Wealth Management has no information to disclose in relation to this Item.

Item 5. Additional Compensation

Marks Wealth Management is required to disclose information regarding any arrangement under which Catherine Cavalier Jackson receives an economic benefit from someone other than a client for providing investment advisory services. Marks Wealth Management has no information to disclose in relation to this Item.

Item 6. Supervision

Charles Marks, Chief Executive Officer and Chief Compliance Officer, is generally responsible for supervising Catherine Cavalier Jackson's advisory activities on behalf of Marks Wealth Management. Charles Marks can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

Marks Wealth Management supervises its personnel and the investments made in client accounts. Marks Wealth Management monitors the investments recommended by Catherine Cavalier Jackson 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. Marks Wealth Management periodically reviews the advisory activities of Catherine Cavalier Jackson, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Catherine Cavalier Jackson.