



IAPD Report

JORDAN MARK WILSON

CRD# 5446695

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When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

JORDAN MARK WILSON (CRD# 5446695)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **05/28/2026**.

CURRENT EMPLOYERS

Firm	CRD#	Registered Since
IA MERIDIAN WEALTH MANAGEMENT, LLC	CRD# 151523	07/03/2025

QUALIFICATIONS

This representative is currently registered in **0** SRO(s) and **1** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration. Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

FIRM	CRD#	LOCATION	REGISTRATION DATES
B ROBERT W. BAIRD & CO. INCORPORATED	8158	Lexington, KY	07/29/2022 - 07/20/2025
IA ROBERT W. BAIRD & CO. INCORPORATED	8158	Lexington, KY	07/29/2022 - 07/20/2025
IA TRUIST ADVISORY SERVICES, INC.	283390	Lexington, KY	02/17/2021 - 06/24/2022

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Criminal	1



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **1** jurisdiction(s) and **0** SRO(s) through his or her employer(s).

Employment 1 of 1

Firm Name: **MERIDIAN WEALTH MANAGEMENT, LLC**
Main Address: 100 W MAIN STREET
SUITE 450
LEXINGTON, KY 40507
Firm ID#: 151523

Regulator	Registration	Status	Date
IA Kentucky	Investment Adviser Representative	Approved	07/03/2025

Branch Office Locations

MERIDIAN WEALTH MANAGEMENT, LLC
100 W MAIN STREET
SUITE 450
LEXINGTON, KY 40507



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 2 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

Exam	Category	Date
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No information reported.

General Industry/Product Exams

Exam	Category	Date
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Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
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General Securities Representative Examination (S7)	Series 7	01/21/2010
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State Securities Law Exams

Exam	Category	Date
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Uniform Investment Adviser Law Examination (S65)	Series 65	11/13/2012
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Uniform Securities Agent State Law Examination (S63)	Series 63	09/23/2010
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PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Certified Financial Planner

This representative holds or did hold **1** professional designation(s) that may have been used to qualify as an Investment Advisor representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
B	07/29/2022 - 07/20/2025	ROBERT W. BAIRD & CO. INCORPORATED	CRD# 8158	Lexington, KY
IA	07/29/2022 - 07/20/2025	ROBERT W. BAIRD & CO. INCORPORATED	CRD# 8158	Lexington, KY
IA	02/17/2021 - 06/24/2022	TRUIST ADVISORY SERVICES, INC.	CRD# 283390	Lexington, KY
B	02/17/2021 - 06/24/2022	TRUIST INVESTMENT SERVICES, INC.	CRD# 17499	LEXINGTON, KY
B	01/02/2018 - 02/17/2021	BB&T SECURITIES, LLC	CRD# 142785	RICHMOND, VA
IA	01/02/2018 - 02/17/2021	BB&T SECURITIES, LLC	CRD# 142785	RICHMOND, VA
IA	11/15/2012 - 01/02/2018	BB&T INVESTMENT SERVICES, INC.	CRD# 33856	LEXINGTON, KY
B	09/05/2012 - 01/02/2018	BB&T INVESTMENT SERVICES, INC.	CRD# 33856	LEXINGTON, KY
B	01/25/2010 - 06/03/2011	NORTHWESTERN MUTUAL INVESTMENT SERVICES, LLC	CRD# 2881	LEXINGTON, KY

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
07/2025 - Present	Meridian Wealth Management, LLC	Wealth Management Advisor	Y	Lexington, KY, United States
07/2022 - 07/2025	Baird	Financial Advisor	Y	Lexington, KY, United States
02/2021 - 07/2022	TRUIST ADVISORY SERVICES, INC.	Wealth Advisor	Y	ATLANTA, GA, United States
02/2021 - 07/2022	TRUIST INVESTMENT SERVICES, INC.	Wealth Advisor	Y	LEXINGTON, KY, United States
01/2019 - 02/2021	BB&T	Wealth Advisor	Y	Lexington, KY, United States
01/2018 - 02/2021	BB&T SECURITIES, LLC	Wealth Advisor	Y	Richmond, VA, United States



Registration & Employment History

EMPLOYMENT HISTORY

Employment Dates	Employer Name	Position	Investment Related	Employer Location
08/2012 - 02/2021	BB&T INVESTMENT SERVICES, INC.	REGISTERED REPRESENTATIVE	Y	Charlotte, NC, United States
08/2012 - 01/2019	BB&T BANK	PRIVATE ADVISOR	Y	LEXINGTON, KY, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

JUNIOR ACHIEVEMENT OF THE BLUEGRASS

POSITION: Board Member NATURE: Non-Profit Board of Directors INVESTMENT RELATED: No NUMBER OF HOURS: 1 SECURITIES TRADING HOURS: 1 START DATE: 01/04/2010 ADDRESS: 1092 Duvall St. Ste. 240, Lexington KY 40515 DESCRIPTION: Promotes entrepreneurship and business knowledge for children K-12. They raise money through company sponsorship, direct donations, and fundraising events.

DV8 KITCHEN

POSITION: Member NATURE: All-day breakfast, fast casual restaurant. DV8 will consist of a breakfast all day offering and wholesale bakery. INVESTMENT RELATED: No NUMBER OF HOURS: 1 SECURITIES TRADING HOURS: 0 START DATE: 08/15/2017 ADDRESS: 867 S Broadway, Lexington KY 40504

FAYETTE PROPERTY GROUP LLC

POSITION: member NATURE: own residential rental property INVESTMENT RELATED: No NUMBER OF HOURS: 2 SECURITIES TRADING HOURS: 0 START DATE: 12/23/2020 ADDRESS: 245 Rand Ave., Lexington KY 40508

Name of Business: Fayette Property Group LLC.

Address: Lexington, Kentucky

Position: Member

Nature: Fayette Property Group LLC owns one duplex. We're currently in the rental real estate business.

Start Date: 12/01/2020

Investment Related: No

Number of Hours: 5

Securities Trading Hours: 0

Description: Finding tenants, paying bills, maintaining financials.

Name/Address: Illuminate Hope LLC, 245 Rand Ave, Lexington, KY 40508

Start Date: April 18th, 2023

Hours Spent: 0-5 hours/month

Hours Spent During Trading: 0-1 hours/month

Role/Responsibility: Board Member with checking signing authority.

Investment Related

THE REFUGE CLINIC; BOARD MEMBER; NON-PROFIT MEDICAL CLINIC; NON-INVESTMENT RELATED; NO COMPENSATION; 2 HOURS PER QUARTER DEVOTED TO THIS ACTIVITY AND ALL ARE DURING SECURITIES TRADING



Registration & Employment History



OTHER BUSINESS ACTIVITIES

HOURS; DUTIES INCLUDE: ATTEND 4 BOARD MEETINGS PER YEAR, FUNDRAISING EVENTS



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Criminal	1

Criminal

This disclosure event involves a criminal charge against the Investment Adviser Representative that has resulted in a dismissal, plea, acquittal or conviction. The criminal matter may relate to any felony or certain misdemeanor offenses (e.g., bribery, perjury, forgery, counterfeiting, extortion, fraud, wrongful taking of property).

Disclosure 1 of 1

Reporting Source:	Individual
If charge(s) were brought against an organization over which individual exercised control:	
Organization Name:	
Investment Related Business:	No
Position:	
Formal Charges were brought in:	COUNTY
Name of Court:	KENTON COUNTY COURT SYSTEM
Location of Court:	FORT WRIGHT, KY
Docket/Case #:	DI 06-M-07008
Charge Date:	12/29/2006
Charge(s) 1 of 1	
Formal Charge(s)/Description:	THEFT BY UNLAWFUL TAKING/DISP-ALL OTHERS UNDER \$300
No of Counts:	1
Felony or Misdemeanor:	Misdemeanor
Plea for each charge:	GUILTY
Disposition of charge:	Dismissed
Current Status:	Final
Status Date:	05/02/2007



Disposition Date:	05/02/2007
Sentence/Penalty:	4 MONTHS DIVERSION- COMPLETED ON 5/2/07; FINE \$100.00 PAID ON 5/2/07; 20 HOURS COMMUNITY SERVICE- COMPLETED ON 5/1/07.
Broker Statement	MR. WILSON AND FRIEND WERE LOOKING FOR "FIRE WOOD" CAME UPON SOME SKIDS, DIDN'T REALIZE THEY BELONGED TO ANYONE/COMPANY, THOUGHT THEY WERE TRASH/DISPOSAL, HELPED THEMSELVES. POLICE OFFICER OBSERVED, CITED AND TOOK TO A HOLDING CELL. CASE DIVERSION ACCEPTED 5/2/07.



End of Report

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