



**PRAJANA VENTURES, LLC  
dba as wealthrabbit**

**Form ADV Part 2  
Firm Brochure**

**May 22, 2026**

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This Brochure provides information about the qualifications and business practices of wealthrabbit and Adam E. Ackerman, Investment Adviser Representative. If you have questions about the content of this Brochure, please contact us at the above email address or telephone number. The information in this Brochure has not been approved or verified by the United States Securities Exchange Commission or by any state securities authority.

wealthrabbit a registered investment adviser. Registration of an Investment Adviser does not imply any level of skill or training. The oral and written communications of an Adviser provide you with information about which you determine to hire or retain an Adviser.

Additional information about wealthrabbit and Adam E. Ackerman is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

The CRD# for wealthrabbit is 330633.

*Please Retain a Copy of This Brochure for Your Records*



## Item 2 - Material Changes

Form ADV 2 is divided into two parts: Part 2A and Part 2B. Part 2A (the “Firm Brochure”, “Disclosure Brochure” or “Brochure”) provides information about a variety of topics relating to an Advisor’s business practices and conflicts of interest. Part 2B (the “Brochure Supplement”) provides information about advisory personnel of Prajana Ventures, LLC dba wealthrabbit.

wealthrabbit believes that communication and transparency are the foundation of our relationship and continually strive to provide our clients with the complete and accurate information at all times. We encourage all current and prospective clients to read this Disclosure Brochure and discuss any questions you may have with us.

And of course, we always welcome your feedback.

The following changes have been made to this Disclosure Brochure since the last filed and distributed version:

- Liability Insurance : Item 18
- The firm has filed to register in multiple states
- Fees and compensation Item 5

### **Future Changes :**

From time to time, we may amend this Disclosure Brochure to reflect changes in our business practices, changes in regulations and routine annual updates as required by the securities regulators. This complete Disclosure Brochure or a Summary of Material Changes shall be provided to each Client annually and if a material change occurs in the business practices of wealthrabbit.

At any time, you may view the current Disclosure Brochure on-line at the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You may also request a copy of this Disclosure Brochure at any time, by contacting us at (803) 324-7100.



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## Item 4 – Advisory Business

Prajana Ventures, LLC dba wealthrabbit began providing advisory services in August 2024 and its principal place of business in Rock Hill, SC. Prajana dba wealthrabbit is a Delaware limited liability company and is eligible to registered with South Carolina and is pending registration as an investment adviser with all states under the Investment Advisers Act of 1940, Prajana is owned by Jason Ackerman, Adam Ackerman, Nagarajan Palanisamy and other owners. As of 5/20/2026 wealthrabbit manages \$2,619,916.99 in assets.

### Advisory Services:

wealthrabbit works with employers to provide investment options to their individual employees through the Wealth Rabbit App. The employer can subscribe to the software so employees who are eligible for a simple IRA (under 100 employees) . wealthrabbit exclusively provides investment advisory and discretionary portfolio management services through the wealthrabbit App to individual users (“wealthrabbit Users”), who are natural persons. Within the wealthrabbit App, Employees/Users can employ filtering and search tools to discover and invest in proprietary investment strategies managed by wealthrabbit.

wealthrabbit users maintain complete control when it comes to deciding whether to replicate one or more portfolios within the wealthrabbit App.

wealthrabbit does not provide financial planning services or give tax or legal advice. Users are urged to consult with his or her own advisors with respect to the legal, tax, regulatory, financial, and accounting consequences of an investment in any Premium Portfolio.

### User Profiles and Risk Scoring:

The Wealth Rabbit App also gathers and evaluates information provided by each wealthrabbit User, encompassing details such as age, income, investment objectives, investment horizon, risk tolerance, and other pertinent information utilized by wealthrabbit to construct a comprehensive user profile, referred to as the "User Profile." This User Profile may incorporate a risk tolerance, which is exclusively determined based on responses provided by Users during the creation of their profile.

In addition, Users hold the flexibility to update their User Profile at their discretion. Such updates may or may not result in a modification to the User's risk tolerance. In all instances, wealthrabbit Users bear sole responsibility for notifying wealthrabbit of any alterations to their financial situation, investment objectives, risk tolerance, or investment constraints



### General Considerations:

The wealthrabbit App is a mobile and online investment platform, wealthrabbit provides its advisory services primarily online, however customer support is available for telephone consultation as needed to provide a complete advisory experience to wealthrabbit Users.

wealthrabbit Users should be familiar with investing online and comfortable communicating with wealthrabbit through electronic means. When Users agree to the terms of the wealthrabbit App, they agree to receive all communications and documents electronically (via email or directly through the Wealth Rabbit App). The wealthrabbit App is not suitable for Users that they have limited access to the internet or don't have the physical technology required to run the wealthrabbit App.

### Item 5 – Fees and Compensation

wealthrabbit shall charge and be entitled to receive a management fee (“Management Fee”) computed on an annual rate based on the value of any assets of the Account (“Managed Assets”). The Management Fee shall be computed daily using the end-of-day value of the Managed Assets, Fees are by the Custodian Apex in arrears and paid to wealthrabbit on a monthly basis. Either the client or wealthrabbit may cancel the agreement at any time with thirty day’s notice.

The management fees are as follows:

Asset Range	Asset Fee
\$0 – \$249,999	0.50%
\$250,000 - \$499,999	0.40%
\$500,000 - \$749,999	0.30%
\$750,000 - \$999,999	0.25%
\$1,000,000 +	0.20%

Fees are calculated on A tiered basis. As an example, if a client has \$800,000 invested, they would be charged 0.50% on the first \$249,999., then 0.40% on the next \$250,000., 0.30% on the next \$250,000. And 0.25% on the final \$50,001.

wealthrabbit also assesses a software monthly charge to Simple IRA employers of \$29 + \$4 per employee per month. For SEP Employers it is a flat fee of \$6.00 per month.

There is not a software fee for Individuals .



In addition, clients will pay some fees through wealthrabbits 's custodian APEX including: The Annual Maintenance Fee (\$10 per year). if you choose to opt out of electronic statements there is an additional \$5.00 per month fee for paper statements . wealthrabbit will not increase fees without the client's consent. Lower fees for comparable services my be available for other sources. There is a \$60. - \$80. Termination fee.

## **Item 6 – Performance-Based Fees and Side-by-Side Management**

wealthrabbit does not charge any performance-based fees

## **Item 7 – Types of Clients**

wealthrabbits's clients consist of individuals, including High Net Worth individuals and potentially their employers. wealthrabbit does not require a minimum account size for opening or maintaining a User account. Individuals may become wealthrabbit client by applying to open an account through the Wealth Rabbit App. All required documents and disclosures are executed and presented in the wealthrabbit App.

## **Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss**

wealthrabbit offers its clients, through the wealthrabbit Application, the option of five diversified portfolios ("the Portfolios") designed to meet specific time horizon and risk-return profiles. These portfolios are comprised of financial instruments including Exchange Traded Funds (ETFs), Mutual Funds, and individual securities including a mix of equity, fixed income and multi-asset strategies. The investment options are as follows:

- Snowshoe (Conservative) – Seeks to provide investors with a diversified portfolio primarily invested in fixed income with a focus on income generation and capital preservation.
- Angora (Moderately Conservative) – Seeks to provide investors with a diversified portfolio across a balance of fixed income and equity exposure with a bias towards income generation.
- Lop (Moderate)- Seeks to provide investors with a diversified portfolio across a balance of fixed income and equity exposure.
- Cottontail (Moderately Aggressive) – Seeks to provide investors with a diversified portfolio across a balance of fixed income and equity exposure with a bias towards capital appreciation.
- Jackrabbit (Aggressive) – Seeks to provide investors with a diversified portfolio focused on growth and capital appreciation.
- Silver Hare (5% Crypto, 95% aggressive model) – Seeks to give 5% exposure to crypto assets and the rest to growth and capital appreciation

- Wild Thumper (10% Crypto, 90% aggressive model) – seeks to give 10% exposure to crypto assets and the rest to growth and capital appreciation
- Ember Jack (20% Crypto, 80% aggressive model) – seeks to give 20% exposure to crypto assets and the rest to growth and capital appreciation
- Storm Hopper (50% Crypto, 50% aggressive model) – seeks to give 50% exposure to crypto assets and the rest to growth and capital appreciation
- Jackalope (100% Crypto) – seeks to give 100% exposure to crypto assets

### **Portfolio Strategies:**

The Portfolios are fully discretionary, ETF and ETP allocation programs offering a series of model portfolios positioned at various points along the risk/return spectrum. wealthrabbit works alongside third-party managers (“Model Providers”) to develop and monitor these Portfolios.

All crypto models are designed by Bitwise and invest in publicly traded Bitwise ETF’s and ETP’s

### **Methods of Analysis:**

wealthrabbit offers asset allocation strategies that include allocations to multiple asset classes, such as equities and fixed income. Such strategies typically operate within a target allocation range for different asset classes, and exposures are further determined based on consideration of opportunities within each asset class. Prajana Ventures, LLC also offers adaptive asset allocation strategies that attempt to reduce the risk of loss or a drop in the value of invested capital that is unlikely to be regained over a full market cycle (i.e., a time period representing a significant market decline and recovery). At the same time, these strategies seek to participate in the upside growth of the capital markets.

The components of each portfolio are selected by the Model Provider with additional and final oversight provided by wealthrabbit. wealthrabbit conducts an in-depth analysis to ensure the portfolio is designed to achieve an outcome in line with its risk/return goals. ETFs are generally evaluated and selected based on a variety of factors, including, as applicable and without limitation, past performance, fee structure, portfolio manager, fund sponsor, overall ratings for safety and returns, and other factors.

### **Risk of Loss:**

While wealthrabbit seeks to diversify clients’ investment portfolios across various asset classes consistent with their Investment Plans in an effort to reduce risk of loss, all investment portfolios are subject to risks. Accordingly, there can be no assurance that client investment portfolios will be able to fully meet their investment objectives and goals, or that investments will not lose money.

Below is a description of several of the principal risks that client investment portfolios face.

**Management Risks.** While wealthrabbit manages client investment portfolios based on Prajana's experience, research and proprietary methods, the value of client investment portfolios will change daily based on the performance of the underlying securities in which they are invested. Accordingly, client investment portfolios are subject to the risk that wealthrabbit allocates assets to asset classes that are adversely affected by unanticipated market movements, and the risk that wealthrabbit's specific investment choices could underperform their relevant indexes.

**Risks of Investments in Mutual Funds, ETFs and Other Investment Pools.** As described above, wealthrabbit may invest client portfolios in mutual funds, ETFs and other investment pools ("pooled investment funds"). Investments in pooled investment funds are generally less risky than investing in individual securities because of their diversified portfolios; however, these investments are still subject to risks associated with the markets in which they invest. In addition, pooled investment funds' success will be related to the skills of their particular managers and their performance in managing their funds. Pooled investment funds are also subject to risks due to regulatory restrictions applicable to registered investment companies under the Investment Company Act of 1940.

**Equity Market Risks.** wealthrabbit will generally invest portions of client assets directly into equity investments, primarily stocks, or into pooled investment funds that invest in the stock market. As noted above, while pooled investments have diversified portfolios that may make them less risky than investments in individual securities, funds that invest in stocks and other equity securities are nevertheless subject to the risks of the stock market. These risks include, without limitation, the risks that stock values will decline due to daily fluctuations in the markets, and that stock values will decline over longer periods (e.g., bear markets) due to general market declines in the stock prices for all companies, regardless of any individual security's prospects.

**Foreign Securities Risks.** wealthrabbit may invest portions of client assets into pooled investment funds that invest internationally. While foreign investments are important to the diversification of client investment portfolios, they carry risks that may be different from U.S. investments. For example, foreign investments may not be subject to uniform audit, financial reporting or disclosure standards, practices or requirements comparable to those found in the U.S. Foreign investments are also subject to foreign withholding taxes and the risk of adverse changes in investment or exchange control regulations. Finally, foreign investments may involve currency risk, which is the risk that the value of the foreign security will decrease due to changes in the relative value of the U.S. dollar and the security's underlying foreign currency.

**Model and Data Risk.** When Models and data utilized by Prajana prove to be incorrect or incomplete, any decisions made in reliance thereon expose clients to potential risks. All models rely on correct market data inputs. If incorrect market data is entered into even a well-founded model, the resulting valuations will be incorrect. However, even if market data is input correctly, "model prices" will often differ substantially from market prices, especially for securities with complex characteristics, such as derivative instruments. Investing in securities involves risk of loss that clients should be prepared to bear.



Digital assets are subject to evolving, complex, and frequently changing regulatory oversight globally. Regulatory actions, changes in domestic or international laws, or enforcement actions by government agencies may severely impact the legality, transferability, pricing, and overall market value of digital assets. There is no guarantee that a given digital asset will not be deemed a security, commodity, or illegal asset in the future.

### **Item 9 – Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of wealthrabbit. wealthrabbit has no information applicable to this Item.

### **Item 10 – Other Financial Industry Activities and Affiliations**

wealthrabbit, is not actively engaged in business other than giving investment advice. Adam Ackerman currently works for BNA Wealth, Inc, a registered investment advisor. Jason works for BNA CPA's & Advisors, a CPA firm. Please refer to supplement 2B for a full listing of Jason and Adam's work experience.

Because clients are enrolled generally through their employer and are self-directing investments through the wealthrabbit application and wealthrabbit will not be soliciting existing BNA Wealth Clients, we do not believe there is a material conflict of interest between the principals' work at BNA Wealth and wealthrabbit.

### **Item 11 – Code of Ethics, Participation or Interest in Client Transactions**

wealthrabbit has adopted a Code of Ethics ("the Code"), the full text of which is available to you upon request. wealthrabbit Code has several goals. First, the Code is designed to assist wealthrabbit in complying with applicable laws and regulations governing its investment advisory business. wealthrabbit owes fiduciary duties to its clients. Pursuant to these fiduciary duties, the Code requires wealthrabbit associated persons to act with honesty, good faith and fair dealing in working with clients. In addition, the Code prohibits associated persons from trading or otherwise acting on insider information.

Next, the Code sets forth guidelines for professional standards for Prajana Ventures' associated persons (managers, officers and employees). Under the Code's Professional Standards, wealthrabbit expects its



associated persons to put the interests of its clients first, ahead of personal interests. In this regard, wealthrabbit associated persons are not to take inappropriate advantage of their positions in relation to wealthrabbit.

Third, the Code sets forth policies and procedures to monitor and review the personal trading activities of associated persons. From time-to-time wealthrabbit associated persons may invest in the same securities recommended to clients. Under its Code, wealthrabbit has adopted procedures designed to

reduce or eliminate conflicts of interest that this could potentially cause. The Code's personal trading policies include procedures for limitations on personal securities transactions of associated persons, reporting and review of such trading and pre-clearance of certain types of personal trading activities. These policies are designed to discourage and prohibit personal trading that would disadvantage clients. The Code also provides for disciplinary action as appropriate for violations.

The firm maintains their "Business Continuity Plan" in order to enable that our representatives to meet their existing fiduciary obligations to clients

## **Item 12 – Brokerage Practices**

Apex Clearing Corporation ("APEX") provides execution and clearing services to wealthrabbit and users of the wealthrabbit application. The APEX relationship is managed by wealthrabbit executives. Prajana Ventures may receive from a broker-dealer or a fund company, without cost and/or at a discount, certain services and/or products, to assist in monitoring and servicing investment accounts. These may include investment-related research, pricing information and market data, software and other technology that provide access to Investment Account data, compliance and/or practice management-related publications, discounted or free consulting services, discounted or free attendance at conferences, meetings, and other educational or social events, marketing support, computer hardware or software, and other products used by wealthrabbit to assist in its investment advisory business operations.

## **Item 13 – Review of Accounts**

wealthrabbit App provides all Clients with continuous access to the App or Platform regarding information about Investment Account status, portfolio allocations, securities, and Investment Account balances.

wealthrabbit will contact and remind Clients at least annually via electronic channels to request that Clients update their personal information to account for any material changes that have occurred.



Clients have access to current Investment Account balances and positions through the Platform. The Custodian prepares account statements showing all transactions and account balances during the prior quarter. Clients are urged to compare the account statements they receive from the Custodian with those provided on the Platform. All information relating to Investment Accounts is provided on the App. wealthrabbit requests that Clients reconfirm their current profile information as needed and will remind clients at least biannually to update their information on the wealthrabbit App.

#### **Item 14 – Client Referrals and Other Compensation**

wealthrabbit and its related persons do not receive an economic benefit (such as sales awards or other prizes) from any third party for providing investment advice or other advisory services to Clients. However, Prajana Ventures may receive from a broker-dealer or a fund company, without cost and/or at a discount, certain services and/or products, to assist in monitoring and servicing investment accounts. These may include investment-related research, pricing information and market data, software and other technology that provide access to Investment Account data, compliance and/or practice management-related publications, discounted or free consulting services, discounted or free attendance at conferences, meetings, and other educational or social events, marketing support, computer hardware or software, and other products used by wealthrabbit to assist wealthrabbit in its investment advisory business operations.

#### **Item 15 – Custody**

wealthrabbit does not maintain custody of Client's funds or securities. All Client Investment Accounts are held with the Custodian. Participation in the wealthrabbit App requires that a Client agrees to the Custodian's customer agreement (the "Custodian Agreement"), whereby the Custodian will carry a brokerage account that holds Client securities and cash and will record Client transactions on the wealthrabbit App as well as act as the clearing broker and qualified custodian for Client Investment Accounts. Neither wealthrabbit nor any investment service provider engaged by Prajana Ventures is responsible for the obligations of the Custodian or any successor custodian. Clients should receive, on at least a quarterly basis, statements from the broker-dealer, bank or other qualified custodian that holds and maintains the Client's investment assets. We urge you to carefully review such statements and compare such official custodial records to the reports that we may provide to you. Our reports may vary from custodial statements based on accounting procedures, reporting dates, or valuation methodologies of certain securities.



## **Item 16 – Investment Discretion**

wealthrabbit currently only provides discretionary services to Clients via its Wealth Rabbit App. Users can select and change models at their own discretion. wealthrabbit will have the discretion to select and make changes of the investments inside the model for rebalancing and creation of the model selected by the User. Should wealthrabbit expand its advisory service offering to include non-investment discretion inside the wealthrabbit App,

wealthrabbit will revise this section and any other sections of this Brochure, as needed.

## **Item 17 – Voting Client Securities**

wealthrabbit does not vote proxies on behalf of advisory clients. Clients retain the responsibility for receiving and voting proxies for any and all securities in their portfolios. Upon request, wealthrabbit may provide advice to clients regarding the clients' voting of proxies. Please contact Adam E. Ackerman via email [adam@wealthrabbit.com](mailto:adam@wealthrabbit.com)

## **Item 18 – Financial Information**

wealthrabbit has no financial commitment that impairs its ability to meet contractual and fiduciary commitments to clients, has not been the subject of a bankruptcy proceeding.

We not solicit prepayments Our fees are in the arrears.

The firm holds professional liability insure for its investment advisory services. A copy is available upon request a copy will be provided within 30 days.

## **Item 19 – Requirements for State-Registered Advisers**

wealthrabbit's two principal owners, Jason Ackerman and Adam Ackerman, have been involved in the investment management industry in various capacities since 2015. Jason holds the Certified Public Accountant (CPA) designation and have both earned the Certified Financial Planner (CFP) designation (detailed in Jason's ADV part 2B). It's anticipated approximately 25% of their time will be dedicated to the operations of wealthrabbit. Please refer to part ADV Part 2B for additional employment and educational information for Jason and Adam. Adam Ackerman is also a registered representative for BNA Wealth , Inc. He spends approximately 25% of his time fulfilling his responsibilities.



**Supervised Person:  
Jason L. Ackerman  
CRD# 6694276**

**Compliance Officer  
Adam E. Ackerman  
CRD# 6447420**

**May 22, 2026**

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Email: [Adam@wealthrabit.com](mailto:Adam@wealthrabit.com)/[www.wealthrabit.com](http://www.wealthrabit.com)

This Brochure Supplement provides information about the qualifications and background of Jason Ackerman of wealthrabit, Investment Adviser Representative. If you have questions about the content of this Brochure Supplement, please contact us at the above email address or telephone number. The information in this Brochure has not been approved or verified by the United States Securities Exchange Commission or by any state securities authority.

Additional information about Jason Ackerman is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

The CRD number for Jason Ackerman is 6694276.



**Education and Business Standards:**

wealthrabbit requires the successful acquisition of a college degree, or demonstrated and successful business experience, or a combination of both, and requisite continuing education. Related employees of Prajana Ventures may also be required to have examinations based on specific state examination requirements and continuing education requirements.

Jason L. Ackerman was born in 1986 and is the Financial Officer for wealthrabbit and the Vice President of BNA CPAs & Advisors. Jason graduated with a BA in Accounting and a minor in Art History from New York University in 2009. He obtained his CPA license in 2011 and in 2014, Jason became a (CFP) Certified Financial Planner Professional after meeting the educational, experience, examination and ethical requirements.

**Employment History:**

Mr. Jason L. Ackerman’s Employment History

**Prajana Ventures, LLC dba wealthrabbit**

Chief Financial Officer	5/2024 - Present
Investment Adviser Representative	9/2024 - Present

**Consolidated Advisors**

Investment Advisor Representative	8/2016 - 4/2022
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**BNA CPA & Advisors**

Vice President	10/2012 - Present
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**KPMG**

Associate	6/2009 - 9/2012
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**Disciplinary Information:**

Jason L. Ackerman has not had any legal or disciplinary events in his past. Clients and prospective clients can view the CRD records (registration records) for Jason L. Ackerman through the SEC’s Investment Adviser Public Disclosure (IAPD) website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or FINRA’s BrokerCheck database online at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

### **Other Business Activities:**

Jason Ackerman also serves as a Vice President for BNA CPA'S & Advisors, where he provides tax planning, tax compliance, and other accounting services for individuals, corporations, partnerships and not-for-profit entities. Because BNA Wealth / BNA CPA and Advisors and wealthrabbit work with different types of clients and wealthrabbit clients' investments are self-directed, we do not believe this causes a conflict of interest.

### **Additional Compensation:**

wealthrabbit would be required to disclose additional information if any additional compensation was received from non-clients for advisory services. Presently, no such additional compensation is being received, wealthrabbit has no information to disclose in this regard.

### **Professional Designations, Licensing and Exams:**

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 75,600 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 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.

The CERTIFIED PUBLIC ACCOUNTANT (CPA) designation is professional certification. In order to obtain this, one must meet the following requirements, which are often referred to as the "3 e's" of education, exam, and experience:

#### **Education:**

Earn a bachelor's degree from an accredited institution with a focus on accounting or business, and complete 150 college-level credits. This may include additional courses or a master's degree, as some states require 150 semester hours to take the CPA exam. Required courses often include accounting principles, business ethics, business management, finance, statistics, and economics.

#### **Exams:**

Pass all four parts of the Uniform CPA Examination, which includes multiple-choice, essay, and scenario-based questions. The exam is scored on a scale of 0–99, and you must score at least 75 to pass each section.

#### **Experience:**

Complete 1–2 years of relevant and verified accounting and accounting-related work experience. One may also need to pass an ethics exam.

#### **Supervision:**

As the Chief Compliance Officer of wealthrabbit is Adam E. Ackerman who is primarily responsible for the compliance and supervision of wealthrabbit and Jason Ackerman. As Chief Compliance Officer, Adam adheres to the policies and procedures described in the firm's Compliance Manual. Advisory clients may contact Adam E. Ackerman directly by calling (803) 324-7100 or via email at [adam@wealthrabbit.com](mailto:adam@wealthrabbit.com).



**Compliance Officer:  
Adam E. Ackerman  
CRD# 6447420**

**May 22, 2026**

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The CRD number for Adam E. Ackerman is 6447420.



**Education and Business Standards:**

wealthrabbit requires the successful acquisition of a college degree, or demonstrated and successful business experience, or combination of both, and requisite continuing education. Related employees of wealthrabbit may also be required to have examinations based on specific state examination requirements and continuing education requirements.

Adam E. Ackerman was born in 1989 and is the Compliance Officer for wealthrabbit and the President for BNA WEALTH, INC. Adam graduated with a BA in Marketing, Certificate in Entrepreneurship and Certificate in Financial Planning from Florida State University in 2011. In 2018 Adam became a CFP Professional after meeting the educational, experience, examination and ethical requirements.

**Employment History:**

Adam E.. Ackerman’s Employment History

**Prajana Ventures, LLC dba wealthrabbit**

Chief Compliance Officer	5/2024 - Present
Investment Adviser Representative	5/2024 - Present

**BNA Wealth, Inc fka Consolidated Securities**

President/Chief Compliance Officer	7/2020 - Present
Investment Advisor Representative	10/2016 - 7/2020
Sponsorship Series 7 & 65	2/2015 - 6/2015

**Edward Jones**

Investment Advisor Representative	07/2015 - 10/2016
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**Disciplinary Information:**

Adam E. Ackerman has not had any legal or disciplinary events in his past. Clients and prospective clients can view the CRD records (registration records) for Adam E. Ackerman through the SEC’s Investment Adviser Public Disclosure (IAPD) website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or FINRA’s BrokerCheck database online at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).



**Other Business Activities:**

Adam Ackerman also serves as Chief Compliance Officer of BNA Wealth, Inc. BNA Wealth, Inc and wealthrabbit work with different types of clients . wealthrabbit clients' investments are "self-guided". While BNA Wealth, Inc clients are not. This does causes a conflict of interest.

Mr. Ackerman holds and Insurance License however, he does offer any insurance products at wealthrabbit.

**Additional Compensation:**

wealthrabbit would be required to disclose additional information if any additional compensation was received from non-clients for advisory services. At present, no such additional compensation is being received, wealthrabbit has no information to disclose in this regard.

**Supervision:**

As the Chief Compliance Officer of wealthrabbit, Adam E. Ackerman is primarily responsible for the compliance and supervision of wealthrabbit and Jason Ackerman. As Chief Compliance Officer, Adam adheres to the policies and procedures described in the firm's Compliance Manual. Currently there are no additional supervisory procedures for Adam E. Ackerman. Advisory clients may contact Adam E. Ackerman directly by calling (803) 324-7100 or via email at adam@wealthrabbit.com.