

Form ADV Part 3 – Client Relationship Summary

Date: 08/04/2021

Item 1: Introduction

J2 CAPITAL MANAGEMENT, INC. is an investment adviser registered with the Securities and Exchange Commission offering advisory accounts and services. This document gives you a summary of the types of services and fees we offer. Please visit www.investor.gov/CRS for free, simple tools to research firms and for educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

Questions to ask us: Given my financial situation, should I choose an investment advisory service? Why or why not? How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

What investment services and advice can you provide me? Our firm offers comprehensive financial planning performed by a Certified Financial Planning professional, tax planning and preparation done by a CPA, and customized portfolio management services aimed to match client risk tolerance with client goals and objectives. Additionally, as part of the comprehensive planning service, we assist with Estate Planning documents and referrals to other professionals to fill any gaps in execution of the financial plan. As part of our standard services, we typically monitor client accounts daily. Our firm has discretionary management without any material limitations. We limit the types of investments that are recommended since not every type of investment vehicle is needed to create an appropriate portfolio. Our minimum account size is \$200,000. Please also see our Form ADV Part 2A ("[Brochure](#)"), specifically Items 4 & 7.

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

Questions to ask us: Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me? What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have? How might your conflicts of interest affect me, and how will you address them?

What fees will I pay? Our fees vary depending on the services you receive. Additionally, the amount of assets in your account affects our advisory fee; the more assets you have in your advisory account, the more you will pay us and thus we have an incentive to increase those assets in order to increase our fee. Our Investment Advisory Agreement clearly explains our fee schedule. Asset management fees are charged quarterly in advance. Financial planning fees are charged at delivery. Please also see Items 4, 5, 6, 7 & 8 of our [Brochure](#).

Third Party Costs: Some investments (e.g., mutual funds, variable annuities, etc.) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. J2 Capital attempts to mitigate those fees as much as possible and we never share in the revenue from these fees.

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Conflicts of Interest: *When we act as your investment adviser, we must act in your best interest and not put our interest ahead of yours. We do not have any conflicts of interest.*

How do your financial professionals make money? Fees are fully explained in our Investment Advisory Agreement. In the agreement, the client agrees to a fee percentage based on the value of their managed portfolio, or a financial planning fee. Those are the only two ways our financial professionals make money. Please also see Item 10 of our [Brochure](#) for additional information on other financial industry activity and affiliations.

Item 4: Disciplinary History

Questions to ask us: As a financial professional, do you have any disciplinary history? For what type of conduct?

Do you or your financial professionals have any legal or disciplinary history? We do not have any legal and disciplinary events. Visit <https://www.investor.gov/> for a free, simple search tool to research us and our financial professionals.

Item 5: Additional Information

Questions to ask us: Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?

For additional information on our advisory services, see our [Brochure](#) available at <https://adviserinfo.sec.gov/firm/summary/152964> and any individual brochure supplement your representative provides. If you have any questions, need additional up-to-date, or want another copy of this Client Relationship Summary, then please contact us at 248-641-4444 and ask to speak with John Salomon.