This brochure supplement provides information about John Salomon, Jr. that supplements the J2 Capital Management, Inc. brochure. You should have received a copy of that brochure. Please contact John Salomon, Jr., CFO if you did not receive J2 Capital Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about John Salomon is also available on the SEC's website at www.adviserinfo.sec.gov.

# J2 Capital Management, Inc.

Form ADV Part 2B - Individual Disclosure Brochure

for

# John Salomon, Jr.

Investment Adviser Representative

J2 Capital Management, Inc. 2025 W. Long Lake Road, Suite 108, Troy, Michigan, 48098 (248) 641-4444 johns@j2cmonline.com

UPDATED: 08/20/2019

## Item 2: Educational Background and Business Experience

Name: John Salomon, Jr., CPA, CFP

**Born:** 1962

#### **Education Background and Professional Designations:**

#### **Education:**

Accounting, Michigan State University - 1984

#### Designations:

CPA - Certified Public Accountant

#### **CPA MINIMUM QUALIFICATIONS:**

- o A bachelor's degree;
- o 24 semester units in accounting-related subjects;
- o 24 semester units in business-related subjects;
- o 150 semester units (or 225 quarter units) of education;
- o Passing all four parts the Uniform CPA Exam with a 75% or higher;
- o One year of general accounting experience supervised by a CPA with an active license; and
- Passing an ethics course

#### CFP® - Certified Financial Planner

#### **CFP® MINIMUM QUALIFICATIONS:**

- o Bachelor's degree or its equivalent, in any discipline, from an accredited university
- Minimum 15-hour curriculum necessary to prepare for the CFP exam (you may challenge the educational requirements if you are a licensed attorney or are hold any of the following certifications or degrees: Certified Public Accountant, Chartered Financial Analyst, Chartered Financial Consultant, Chartered Life Underwriter, Doctor of Business Administration or PhD in business or economics).
- Apply for and achieve a passing score on the Certified Financial Planner exam.
- Possess at least 3 years of work experience in the financial planning industry teaching, assisting, supervising or delivering financial planning services to a client base for a minimum of 3 years prior to certification.
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation
  or ethical violations. The CFP board verifies all employment history, qualifications and disciplinary issues via FINRA's
  Central Registration Depository.

#### **Business Background:**

2010 - Present Investment Advisor Representative, CFO

J2 Capital Management, Inc.

2018 - 12/2018 Investment Advisor Representative

Alpha Cubed Investments, LLC

2010 - Present Member/Sole Owner

Salomon and Associates, PLLC

2013 - May 2016 Investment Advisor Representative

Regal Investment Advisors, LLC

2002 – 2009 Member/Sole Owner

Salomon Consulting, LLC

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

#### **Item 4: Other Business Activities**

John Salomon, Jr. is the President of the CPA firm Salomon & Associates, PLLC from time to time, he will offer clients advice or products from those activities. During February and March each year Mr. Salomon spends about half of his time preparing taxes for clients of J2CM and non-J2CM clients as well. Mr. Salomon charges a tax preparation fee payable to his CPA firm based on the complexity of the return. J2CM will always act in the best interest of the client.

John Salomon, Jr. is a licensed insurance agent. He does not offer clients advice or products from those activities.

#### **Item 5: Additional Compensation**

John Salomon, Jr. does not receive any additional compensation in return for providing advice to clients other than what has already been disclosed in this supplement and the Form ADV 2A.

### **Item 6: Supervision**

Mr. Salomon and Mr. Benedict work together to create policy and procedures relative to every day activity as well as compliance matters. Our policy and procedure manual will guide our activities for all things compliance related. John Salomon, Jr.'s contact information is on the cover page of this disclosure document.

This brochure supplement provides information about John E. Benedict that supplements the J2 Capital Management, Inc. brochure. You should have received a copy of that brochure. Please contact John E. Benedict, CEO if you did not receive J2 Capital Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about John E. Benedict is also available on the SEC's website at <a href="https://www.adviserinfo.sec.gov">www.adviserinfo.sec.gov</a>.

# J2 Capital Management, Inc.

Form ADV Part 2B - Individual Disclosure Brochure

for

## John E. Benedict

Investment Adviser Representative

J2 Capital Management, Inc. 2025 W. Long Lake Road, Suite 108 Troy, Michigan, 48098 (248) 641-4444 www.j2cmonline.com johnb@j2cmonline.com

UPDATED: 12/12/2018

# Item 2: Educational Background and Business Experience

Name: John E. Benedict

**Born:** 1972

## **Education Background and Professional Designations:**

Education:

BS Business Administration, Central Michigan University - 1998

## **Business Background:**

| 2010 - Present  | Investment Advisor Representative, CEO J2 Capital Management, Inc.  |
|-----------------|---|
| 2018 - 12/2018  | Investment Advisor Representative<br>Alpha Cubed Investments, LLC   |
| 2013 - May 2016 | Investment Advisor Representative<br>Regal Investment Advisors, LLC |
| 2007 - 2009     | Member/Sole Owner<br>Benedict Asset Management, LLC                 |
| 1997 – 2007     | Financial Advisor<br>Ameriprise Financial                           |
| 2006 -2007      | Assistant<br>Dean Witter  |
| 1995 – 2007     | Assistant<br>Center for Financial Planning                          |

#### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

#### **Item 4: Other Business Activities**

John E. Benedict is not engaged in any investment-related business or occupation (other than this advisory firm).

## **Item 5: Additional Compensation**

John E. Benedict does not receive any additional compensation in return for providing advice to clients other than what has already been disclosed in this supplement and the Form ADV 2A.

#### **Item 6: Supervision**

Mr. Salomon and Mr. Benedict work together to create policy and procedures relative to every day activity as well as compliance matters. Our policy and procedure manual will guide our activities for all things compliance related. John E. Benedict's contact information is on the cover page of this disclosure document.