

**Brochure Supplement
Form ADV Part 2B**

Supervised Person:

William Platt, CFP®

MOMENTUM ADVISORS, LLC

**1120 Avenue of the Americas, 4th Floor
New York, NY 10036**

917-997-4297

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As of March 27, 2024, this brochure supplement provides information about William Platt, CFP® (CRD# 4558339), that supplements the Momentum Advisors Form ADV Part 2A Brochure. You should have received a copy of that brochure. Please contact William Platt, Chief Compliance Officer at will@momentum-advisors.com or 917- 997-4297, if you did not receive Momentum Advisors' Brochure, or if you have any questions about the contents of this supplement.

Additional information about William Platt is available on the SEC's website at www.adviserinfo.sec.gov.

NAME: William Platt CFP®

YEAR OF BIRTH: 1979

Item 2. Educational Background and Business Experience

EDUCATION:

- B.A. – Sociology, College of William and Mary, Williamsburg, VA 2001

BUSINESS BACKGROUND:

- Momentum Advisors, Investment Adviser Representative: 2014 to present
- Purshe Kaplan Sterling Investments, Registered Representative: 2014 to 2023
- PT Wealth Management, Owner: 2010 to 2014
- Mass Mutual, Financial Planner: 2002 to 2010

PROFESSIONAL DESIGNATIONS:

- Certified Financial Planner (CFP®)² – conferred by the Certified Financial Planner Board of Standards, Inc. (Denver, CO) in 2007. CFP designees must have completed financial planning coursework from the CFP Board Registered Program, earned a bachelor's degree or higher (in any discipline) from an accredited college or university, completed either 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience, and fulfil an ethics requirement. CFP® designation demonstrates the knowledge and competency necessary to provide comprehensive personal financial planning advice.

Item 3. Disciplinary Information

Momentum Advisors is required to disclose any legal or disciplinary events that are material to a client's or prospective client's evaluation of Mr. Platt. Mr. Platt does not have any history of disciplinary events.

Item 4. Other Business Activities

Mr. Platt is not registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant (“FCM”), commodity pool operator (“CPO”), commodity trading advisor (“CTA”), or an associated person of an FCM, CPO, or CTA. Mr. Platt is an investor in the General Partnership of a private equity fund Miraki, which invests in the commercialization of medical devices and technologies created at Harvard Medical School. These activities take up to 5 hours a year of his time.

Item 5. Additional Compensation

Mr. Platt does not receive sales awards or other such prizes in connection with providing investment advice or other advisory services to clients. Mr. Platt is a licensed insurance

agent who earns commissions for the sale of insurance products, and a shareholder of Momentum Life Brokerage, which sells insurance through licensed agents. As an owner he is entitled to a percentage of the profits of the business.

Item 6. Supervision

As Chief Compliance Officer and Managing Partner of Momentum Advisors, Mr. Platt is responsible for all supervision, formulation and monitoring of investment advice offered to clients. Mr. Platt maintains written supervisory procedures to ensure that the advisory firm and all supervised persons are in compliance with the federal securities laws. Mr. Platt reviews and oversees all material investment policy changes and conducts periodic testing to ensure that client objectives and mandates are met.