

# James J. Davidson, ChFC, CLU

## Form ADV Part 2B

### Strategic Capital Management, Inc.

180 North Glendora Avenue  
Suite 202  
Glendora, California 91741  
TEL: 909.373.2885  
FAX: 909.373.2820

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*This brochure supplement provides clients with information about James J. Davidson that supplements the Strategic Capital Management, Inc. disclosure brochure. You should have received a copy of Strategic Capital Management, Inc. disclosure brochure. Please contact James J. Davidson at 909.373.2885 if you did not receive a copy of the Strategic Capital Management, Inc. disclosure brochure or if you have any questions about the contents of this brochure supplement. Additional information about James J. Davidson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## EDUCATION BACKGROUND AND BUSINESS EXPERIENCE

Individuals associated with Strategic Capital Management, Inc. (“SCM”) must meet certain standards set forth by the firm. Generally, SCM requires associated persons to have a college degree or a minimum four years related experience, have displayed a high degree of integrity in previous business background, have high standards of morals and ethics and be committed to providing quality investment advice.

**James J. Davidson, ChFC, CLU** (Born: 1960)

### Education:

University of Southern California, Bachelor of Science, Business 1983.

### Business Background:

President/Chief Executive Officer, Strategic Capital Management, Inc. (10/1997 – Present)

Registered Representative, Titan Securities (04/2009 – Present)

Investment Adviser Representative, Private Wealth Advisors, Inc. (01/2009 – 04/2009)

Registered Representative, Private Consulting Group (03/2006 – 04/2009)

### Professional Licenses/Designations

Series 6 – Investment Company Products/Variable Contracts Representative Examination (1987)

Series 7 – General Securities Representative Examination (1996)

Series 24 – General Securities Principal Examination (1996)

Series 63 – Uniform Securities Agent State Law Examination (1991)

Chartered Life Underwriter (CLU) (The American College, Bryn Mawr, PA, 1985)

Chartered Financial Consultant (ChFC) (The American College, Bryn Mawr, PA, 1985)

### *Important Information About the Chartered Financial Consultant (ChFC) Designation:*

*The Chartered Financial Consultant (ChFC) designation program focuses on the comprehensive financial planning process as an organized way to collect and analyze information on a client's total financial situation; to identify and establish specific financial goals; and to formulate, implement, and monitor a comprehensive plan to achieve those goals. Each ChFC® must take eight or more college-level courses on all aspects of financial planning from The American College. ChFCs must have at least three years of experience in the financial industry and studied and passed an examination on the fundamentals of financial planning, including income, tax, insurance, investment and estate planning. Each ChFC must also complete a minimum of 30 hours of continuing education every two years.*

### *Important Information about the Chartered Life Underwriter (CFU) Designation:*

*A CLU is a professional advisor in all of the areas of business and family financial security that are encompassed by life insurance. In the United States, The American College is the accredited institution that awards this designation. To become a CLU, an individual must successfully complete a comprehensive course of study and demonstrate competence by passing a series of eight, college-level examinations in several subject areas including: life insurance, pensions, taxation, finance, economics and business, and estate planning. Rigid ethical and experience requirements also must be met.*

#### **DISCIPLINARY INFORMATION**

Mr. Davidson has no legal or disciplinary events to report.

#### **OTHER BUSINESS ACTIVITIES**

Mr. Davidson is also registered representative of Titan Securities (“Titan”), a FINRA-registered broker-dealer. As a registered representative of Titan, Mr. Davidson may receive commissions on securities transactions. To the extent that clients wish Mr. Davidson to implement any recommendations made by SCM, the purchase or sale of any securities in conjunction with the implementation of such recommendations is made through Titan. Since clients are free to implement SCM’s recommendations through any broker-dealer that they choose, the relationship between SCM and Mr. Davidson’s activities with Titan does not create a material conflict of interest with clients.

Mr. Davidson holds a real estate brokers license and is CEO of Secure Close Real Estate and VARETI Holdings, Inc. These companies provide real estate purchase and investment services. He is also the Managing Member of the Davidson Advisory Group, LLC which helps companies raise capital for growth and expansion.

#### **ADDITIONAL COMPENSATION**

Mr. Davidson does not receive any additional compensation for providing advisory services.

#### **SUPERVISION**

SCM provides investment advisory and supervisory services in accordance with SCM’s policies and procedures manual. The primary purpose of SCM’s policies and procedures is to provide adequate supervision of advisory representatives. SCM’s Chief Compliance Officer, James J. Davidson, is primarily responsible for the implementation of SCM policies and procedures and overseeing the activities of the SCM’s supervised persons. Should a client have any questions regarding SCM’s supervision or compliance practices, please contact Mr. Davidson at 909.373.2885.

#### **REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Mr. Davidson has no additional disclosures to make under this Item.