

FORM ADV PART 2B

**Brochure Supplement**  
**William James Mortimer II**

**Item 1 - Cover Page**

**William James Mortimer**, Manager and Chief Investment Officer

**Solidarity Capital Management, LLC**

3600 N. Outlet Parkway, Suite 200  
Lehi, Utah 84043  
(385) 374-1665

This Brochure Supplement dated February 10, 2023 provides information about William James Mortimer II that supplements Solidarity Capital Management, LLC's (the "**Adviser's**") Brochure. A copy of that brochure precedes this supplement. Please contact Jeffrey McClean, Chief Compliance Officer, if the Adviser's Disclosure Brochure is not included with this supplement or if you have any questions about the contents of this supplement. Jeffrey McClean can be reached at (385) 374-1665 or by email at [jeff@solidaritycapital.fund](mailto:jeff@solidaritycapital.fund).

Additional information about Mr. Mortimer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The CRD number for the Adviser is 322596.

## **Item 2 - Educational Background and Business Experience**

William James Mortimer (1981).

### ***Business Background:***

- Solidarity Capital Management, LLC, co-founder, manager and the chief investment officer, June 2022 to Present.
- Solidarity Capital Partners, LLC, co-founder, manager and the chief investment officer, June 2022 to Present.
- Solidarity Wealth, LLC, wealth advisor, October 2021 to Present.
- Wells Fargo Advisors, LLC, senior financial analyst, January 2011 to October 2021.

### ***Education:***

- Master of Science degree in Security Analysis and Portfolio Management from Creighton University, 2011.
- Bachelor of Science degree in Finance from the University of Phoenix, 2008.

### ***Exams, Licenses & Other Professional Designations:***

- 2007: Series 66 Exam.
- 2006: Series 63 Exam, Series 7 Exam.

## **Item 3 - 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 each supervised person providing investment advice. William James Mortimer II has not had any material legal or disciplinary events in the past. Clients and prospective clients can view the CRD record (registration records) for Mr. Mortimer through the SEC's Investment Adviser Public Disclosure (IAPD) website at [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). The CRD number for the Adviser is 322596.

## **Item 4 - Other Business Activities**

Mr. Mortimer is engaged as a wealth adviser for Solidarity Wealth, LLC, an investment adviser registered with the SEC ("Solidarity Wealth"). Mr. Mortimer may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Mortimer, as a fiduciary, will act in the client's best interest and will not recommend any client of the Solidarity Wealth invest in any Client of the Adviser. He will not, however, be offering insurance products nor will he receive customary fees as a result of insurance sales.

## **Item 5 - Additional Compensation**

Mr. Mortimer receives no additional compensation from non-clients for providing advisory services.

## **Item 6 - Supervision**

Jeffrey McClean, Chief Compliance Officer of Solidarity Capital Management, LLC, supervises and monitors Mr. Anderson's activities on a regular basis to ensure compliance with its Code of Ethics. Please

contact Jeffrey McClean if you have any questions about Mr. Anderson's brochure supplement at (385) 374-1665.