



This brochure supplement provides information about Ashley Jonathon Vice that supplements the Solitude Financial Services brochure. You should have received a copy of that brochure. Please contact Ashley Jonathon Vice, Registered Investment Adviser Representative if you did not receive Solitude Financial Services' brochure or if you have any questions about the contents of this supplement.

Additional information about Ashley Jonathon Vice, CRD# 5024371, is also available on the SEC's website at www.adviserinfo.sec.gov.

Solitude Financial Services
Form ADV Part 2B – Individual Disclosure Brochure
for
Ashley Jonathon Vice
Personal CRD Number: 5024371
Investment Adviser Representative

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Form ADV Part 2B

Individual Disclosure Brochure



Item 2: Educational Background and Business Experience

Name: Ashley Jonathon Vice

Born: March 29, 1983

Education, Business Experience, and Professional Designations:

Ashley is a 2005 graduate of Southeastern University in Lakeland, Florida with a Bachelor of Science degree in Finance. He went on to receive a Master's in Business Administration from the University of South Florida in 2011.

In 2013, Ashley was an Investment Advisor Representative with GFS Private Wealth. He stayed in the position until transitioning to Mercer Global Advisors as a Client Advisor in 2018. Later in 2018, Ashley became an Investment Advisor Representative with SIMA Retirement Solutions and its affiliated entity, SIMA Wealth Partners. Ashley ultimately joined Solitude Financial Services in 2021 as a Wealth Advisor and it is where he remains presently.

Ashley is a CERTIFIED FINANCIAL PLANNER™ professional. To attain and maintain the right to use the CFP® marks, an individual must:

- Hold a bachelor's degree (or higher) from an accredited college or university;
- Obtain three years of full-time personal financial planning experience or the equivalent part-time experience (2,000 hours equals one year full-time);
- Complete the CFP Board's registered program or hold another professional designation accepted by the CFP Board;
- Pass the final certification examination;
- Adhere to the CFP Board's *Standards of Professional Conduct*; and
- Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field.

Ashley also holds a CFA® (Chartered Financial Analyst) professional designation. To attain and maintain the right to use the CFA® marks, an individual must:



- Have a minimum of four years professional work experience or be in the final year of a bachelor's degree program or a combination of professional and university experience that totals at least four years;
- Pass all three levels of the CFA Institute's examination; and
- Obtain four years of work experience in the investment decision-making process (accrued before, during, or after participation in the CFA Program).

Item 3: Disciplinary Information

There are no legal or disciplinary events against Ashley material to any clients or prospective clients.

Item 4: Other Business Activities

Ashley has no disclosable other business activities.

Item 5: Additional Compensation

Other than the salary, annual or regular bonuses, and ownership equity distributions paid by Solitude Financial Services, Ashley does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services or client referrals.

Item 6: Supervision

Ashley is supervised by Gene Michael Kowalski, Solitude's principal advisor, and owner. Mr. Kowalski can be reached at 434-218-2201. Mr. Kowalski monitors the advice Ashley provides to clients by periodically reviewing financial plans created by him, by reviewing and approving investment strategies before they are implemented, and by collaborating directly with Ashley and Solitude's clients in annual reviews, planning sessions, trading initiatives, and ad hoc meetings throughout the day.