

Item 1: Cover Page Supervised Person Brochure

Part 2B of Form ADV

Joseph William Petry Sr.



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Latham NY 12110

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This brochure provides information about Joseph William Petry Sr. and supplements the CPR Investments Inc. brochure. You should have received a copy of that brochure. Please contact Joseph William Petry Sr. if you did not receive CPR Investments Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Joseph William Petry Sr. (CRD #4649782) is available on the SEC's website at www.adviserinfo.sec.gov.

November 2, 2020

**Brochure Supplement (Part 2B of Form ADV)
Supervised Person Brochure**

Joseph William Petry Sr.

- Year of birth: 1977
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Item 2: Educational Background and Business Experience

Educational Background:

- Bachelor Music; College of St. Rose; 1999

Business Experience:

- CPR Investments Inc., Investment Advisor Representative; May 2016 to Present
 - CPR Financial Group, LLC; Insurance Agent; May 2016 to Present
 - Quint Wealth Management, Inc.; Investment Advisory Rep; March 2016 to May 2016
 - Ausdal Financial Partners, Inc.; May 2017 to Present
 - HBW; Partner, VP; August 2008 to March 2016
 - Chronogram; Magazine Sales; February 2008 to September 2008
 - PFS; Vice President; September 2003 to January 2006
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Item 3: Disciplinary Information

Criminal Action: None to report within the last ten years.

Administrative Proceedings: None to report.

Self-Regulatory Organization Proceedings: None to report.

Joseph William Petry Sr. had a customer dispute filed February 7, 2012. The client stated Joseph Petry Sr. sold her two life settlement products. Mr. Petry Sr. met with the client in 2010 and helped her invest money into mutual funds and introduced her to a third party who completed all life settlements. The life settlement company has been seized and the client wanted her money back. Mr. Petry Sr. settled with the client.

Item 4: Other Business Activities Engaged In

Joseph William Petry Sr. is also a licensed insurance agent with CPR Financial Group LLC. Mr. Petry is also a registered representative of Ausdal Financial Partners, a broker dealer. Approximately 10% of his time is spent in this business. From time to time, he will offer clients products and/or services from these activities.

This represents a conflict of interest because it gives an incentive to recommend products and services based on the commission and/or fee amount received. This conflict is mitigated by the fact that Mr. Petry has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products or services. Clients have the option to purchase these products or services through another insurance agent of their choosing.

Item 5: Additional Compensation

Joseph William Petry Sr. receives additional compensation as an insurance agent. He does not receive any performance-based fees.

Item 6: Supervision

Joseph William Petry S. is supervised by Charles P Reinhold sole owner and operator of CPR Investments Inc. The services offered by Joseph William Petry Sr. will consider client's risk tolerance by using a questionnaire to determine Asset allocation and recommend models/strategies for investment planning based on the risk tolerance score results. Clients are reminded quarterly to update CPR Investments Inc. of any changes in their risk tolerance. Charles Reinhold monitors all model/strategies offered by CPR Investments Inc. on a regular basis.

Charles Reinhold can be reached at 800-213-1164.