

## **Item 1: Cover Page Supervised Person Brochure**

Part 2B of Form ADV

---

**William Joseph Joslyn**



**6 Century Hill Dr., Ste 2A**

**Latham NY 12110**

**PHONE: (518) 598-3371**

**FAX: (518) 783-0700**

**WEBSITE: [www.cprinvestmentsinc.com](http://www.cprinvestmentsinc.com)**

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

November 2, 2020

---

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

---

**William J. Joslyn**

- Year of birth: 1996
- 

**Item 2: Educational Background and Business Experience**

Business Experience:

- CPR Investments Inc., Investment Advisor Representative; 12/ 2018 to Present
- Scautub Agency LLC., Insurance Broker; 01/2018 - Present
- NY Long Terracare Brokers; Insurance Broker; 04/2016 – December 2018
- Gennaros Pizza, Restaurant Deliveries, 11/2018 – 12/2018
- Executive Cellular Phones, Retail Sales, 09/2018 – 11/2018
- National Life Group, Insurance Agent, 04/2016 – 05/2017
- Fierros Pizza, Restaurant Deliveries, 04/2015 – 04/2018
- Greenfield School, Sanitation, 06/2013 – 08/2013
- Saratoga Schools, Student, 12/2008 – 06/2015

Educational Background:

- No Post-Secondary Education
- 

**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.

---

**Item 4: Other Business Activities Engaged In**

William J. Joslyn. is also a licensed insurance agent with Scautub Agency LLC. Approximately 5% of his time is spent in this business. From time to time, he will offer clients products and/or services from this 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. Joslyn 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**

William J. Joslyn. receives additional compensation as an insurance agent. He does not receive any performance-based fees.

---

**Item 6: Supervision**

Mr. Joslyn is supervised by Charles P Reinhold sole owner and operator of CPR Investments Inc. The services offered by William J. Joslyn. 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