

*This brochure supplement provides information about Richard Bell that supplements the Bell Strategic Investments, Inc. brochure. You should have received a copy of that brochure. Please contact Richard Bell, President if you did not receive Bell Strategic Investments, Inc.'s brochure or if you have any questions about the contents of this supplement.*

*Additional information about Richard Bell is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Bell Strategic Investments, Inc.**  
Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Richard Bell**

Personal CRD Number: 1336367  
Investment Adviser Representative

Bell Strategic Investments, Inc.  
2866 Glenview Way  
Escondido, California, 92025  
(760) 489-8509  
[Richard@bellsi.com](mailto:Richard@bellsi.com)

UPDATED: 5/3/2012

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

**Name:** Richard Bell                      **Born:** 1960

### **Education Background and Professional Designations:**

#### **Education:**

BA Organizational Behavior, Concordia University - 1987

#### **Business Background:**

06/2006 – Present	President Bell Strategic Investments, Inc.
06/2000 – 05/2006	Senior Vice President Wachovia Securities

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## **Item 4: Other Business Activities**

Richard Bell is not engaged in any investment-related business or occupation (other than this advisory firm).

## **Item 5: Additional Compensation**

Other than salary, annual bonuses, or regular bonuses, Richard Bell does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Bell Strategic Investments, Inc..

## Item 6: Supervision

As an owner and representative of Bell Strategic Investments, Inc., Richard Bell supervises all duties and activities of the firm. Richard Bell's contact information is on the cover page of this disclosure document. Richard Bell adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by California securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. Richard Bell has **NOT** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Richard Bell has **NOT** been the subject of a bankruptcy petition at any time.