

*This brochure supplement provides information about Bhavesh D. Patel that supplements the Reliance Wealth & Trust Partners, LLC brochure. You should have received a copy of that brochure. Please contact Bhavesh D. Patel, Managing Member if you did not receive Reliance Wealth & Trust Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

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

# **Reliance Wealth & Trust Partners, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Bhavesh D. Patel**

Personal CRD Number: 4484462

Investment Adviser Representative

Reliance Wealth & Trust Partners, LLC  
13940 North Dale Mabry Highway  
Tampa, Florida, 33618  
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UPDATED: 3/1/2012

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

**Name:** Bhavesh D. Patel

**Born:** 1973

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

#### **Education:**

BA Marketing & Economics, Maharaja Sayajirao University – 1994

#### **Business Background:**

01/2008 – Present	Managing Member Reliance Wealth & Trust Partners, LLC
01/2008 - 02/2009	Branch Manager Raymond James Financial Services
11/2003 - 01/2008	Financial Advisor AXA Advisors
07/2002 - 10/2003	Financial Advisor American Express Financial Advisors
11/2001 - 05/2002	Financial Advisor New York Life
12/1999 - 09/2001	Agent Omni Hotels

## **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**

Bhavesh D. Patel is not engaged in any investment-related business or occupation (other than this advisory firm).

## Item 5: Additional Compensation

Other than salary, annual bonuses, regular bonuses, Bhavesh D. Patel does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Reliance Wealth & Trust Partners, LLC.

## Item 6: Supervision

As the only owner and representative of Reliance Wealth & Trust Partners, LLC, Bhavesh D. Patel supervises all duties and activities of the firm. Bhavesh D. Patel's contact information is on the cover page of this disclosure document. Bhavesh D. Patel 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 Florida securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Bhavesh D. Patel 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. Bhavesh D. Patel has **NOT** been the subject of a bankruptcy petition at any time.