



**REALTA**  
**W E A L T H**

Realta Investment Advisors, Inc.

Donald Wells

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**This Brochure Supplement provides information about Donald Wells that supplements the Realta Investment Advisors, Inc. ("RIA")'s Brochure. You should have received a copy of that Brochure. Please contact Mr. Barrett Schultz at (888) 657-5200 if you did not receive RIA's Brochure or if you have any questions about the contents of this supplement.**

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

## ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

I have been insurance licensed since 1981 and securities licensed since 1983. During that period, I have also been a branch manager on the securities side for 10 years.

My focus is on retirement planning and the execution of that plan. By utilizing traditional investments, annuities and non-correlated alternative investments, my goal is to help build a diversified portfolio that reduces volatility, grows the assets and/or generates income for retirement. I will also explain the advantages and risks of each recommendation along with the costs and fees.

## ITEM 3- DISCIPLINARY INFORMATION

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There are no legal or disciplinary event(s) to disclose. Additional information about your Financial Advisor is available at [www.finra.org/brokercheck](http://www.finra.org/brokercheck) or [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 4- OTHER BUSINESS ACTIVITIES

Donald is licensed to sell securities through Realta Equities, Inc. ("REI"), a securities broker/dealer registered with the Financial Industry Regulatory Authority ("FINRA"). In this capacity, Donald may be involved in the sale of investment products such as securities, mutual funds and variable products. If an advisory client implements recommendations made by Donald by purchasing securities or other products through REI, Donald will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Donald spends approximately 5% of his professional time in his sales capacities at REI.

Donald is also a licensed insurance agent. Donald may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 10% of his time in his capacity as an insurance agent.

## ITEM 5- ADDITIONAL COMPENSATION

Aside from the activities discussed in Item 4 above, Donald receives no economic benefit from any non-client third party.

## ITEM 6- SUPERVISION

Mr. Barrett Schultz (Chief Compliance Officer) and designated supervisors monitor the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Mr. Schultz can be reached at 888-657-5200.