

Joshua J. Wells

Bountiful Investment Management LLC

225 Newman Ave, Suite 303
Rumford, RI 02916
401-305-2626

Form ADV Part 2B

March 2024

Item 1 Brochure Supplement

This brochure supplement provides information about Joshua J. Wells that supplements the Bountiful Investment Management brochure. His individual CRD number is 4498004. Please contact Manuel Rezendes, at 401-305-2626 or at mrezendes@euclidadvisors.com, if the Firm brochure was not provided. Additional information about Joshua J. Wells is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Joshua Jon Wells
Year of Birth: 1975

Education:

Johnson & Wales University
9/1994 - 5/1999

Business Experience:

Bountiful Investment Management; Investment Advisor Representative
12/2022-Present

Bountiful Investment Management; Owner
08/2015-Present

American Portfolio Financial Services; Registered Representative
06/2010-12/2013

Item 3 Disciplinary Information

Joshua has the following disciplinary actions taken against him: Individual transacted business as IA representative in Massachusetts without being registered under Massachusetts Uniform Securities Act; individual made materially misleading statement in document filed with Massachusetts Securities Division.

You can find more information about Joshua Wells on www.adviserinfo.sec.gov and on www.finra.org/brokercheck.

Item 4 Other Business Activities

Euclid Financial Services Insurance Group LLC

Joshua J. Wells is the Owner and President of Euclid Financial Services Insurance Group LLC, an affiliated insurance agency. He is compensated by Euclid Financial Services Insurance Group LLC in the form of a salary in this position. He receives no other compensation or benefits. With roles in both entities, there is a conflict of interest between Mr. Wells' role as an Investment Advisor Representative of Bountiful Investment Management and his role as the President of Euclid Financial Services Insurance Group LLC. Bountiful Investment Management and Joshua J. Wells will always place clients' interests ahead of their own interests when providing advisory services.

Item 5 Additional Compensation

In addition to the description of additional compensation provided in Item 4, Joshua J. Wells can Receive additional benefits.

Certain product sponsors may provide Joshua J. Wells with other economic benefits as a result of his recommendation or sale of the product sponsors' investments. The economic benefits received by Joshua J. Wells from product sponsors can include but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist Joshua J. Wells in providing various services to clients.

Although Bountiful Investment Management and Joshua J. Wells endeavor at all times to put the interest of their clients ahead of their own or those of their officers, directors, or representatives ("affiliated persons"), these arrangements could affect the judgment of Joshua J. Wells when recommending investment products. These situations present a conflict of interest that may affect the judgment of affiliated persons including Joshua J. Wells.

Item 6 Supervision

Manuel R. Rezendes is the Chief Compliance Officer of Bountiful Investment Management. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Manuel R. Rezendes can be contacted at 401-305-2626.