

**Part 2B of Form ADV: Brochure Supplement**

**Item 1 Cover Page:**

**Patricia G. Wells**

Wells Global Investment Advisers LLC

521 West Central Avenue

Winter Haven, FL 33880

Phone: 863-294-3361

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This brochure provides information about Patricia G. Wells that supplements the Wells Global Investment Advisers LLC Brochure. You should have received a copy of that brochure. If you have any questions about the contents of the brochures, please contact us at 863-294-3361. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission (“SEC”) or by any state securities authority.

Additional information about Patricia G. Wells is available on the SEC’s website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

Registration as an investment advisory representative with the SEC or any state securities authority does not imply a certain level of skill or training.

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

Registered investment advisers are required to disclose in this Item the supervised person's name, year of birth, educational background, and business background. Following is the information in response to this requirement.

Patricia G. Wells

Year of Birth: 1959

Educational Background:

- Harvard College - 1981 graduate with B.A. in economics with high honors
- Harvard Business School - 1983 graduate with M.B. A.
- CERTIFIED FINANCIAL PLANNER™ Professional -designation earned in 1992

Business Background:

- Wells Global LLC, an investment advisory firm: Advisory Representative - 05/2009 to Present
- Wells Investments, Inc., an investment advisory firm - position: President, 3/2016 to present; Advisory Representative - 07/2003 to Present
- Valor Financial Securities LLC 12/09 to Present- position: Registered Representative and Managing Member
- Winvest Securities, Inc., holding company for real estate - associate
- I WILL Enterprises LLC. A business offering promotional and motivational items.
- Trust Protector LLC. A business offering trust protector services -- associate
- Co-owner, Go Army LLC, holding company for real estate
- Patriots Stand Up LLC. A business offering patriotic and motivational items - associate

## **Item 3 Disciplinary Information:**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that may be material to your evaluation of each supervised person providing investment advice. There is no information applicable to this requirement.

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

As set forth in Item 2 above, Mrs. Wells is an investment advisor representative for Wells Investments, Inc., an investment advisory representative with Wells Global Investment Advisers LLC ("Wells Global") and a registered representative of Valor Financial Securities LLC ("Valor"). She may receive commissions, bonuses or other cash or non-cash compensation from these entities that are under common ownership with Wells Investments. This compensation represents a substantial part of her income. This arrangement potentially gives Mrs. Wells an

incentive to recommend investment products based on the compensation received, rather than on the client's needs. This practice presents a conflict of interest because persons providing investment advice on behalf of our firm who are registered representatives have an incentive to effect securities transactions for the purpose of generating commissions and/or 12b-1 fees rather than solely based on your needs. However, you are under no obligation to purchase securities products or insurance products through any person affiliated with our firm. Mrs. Wells is also employed by Trust Protector LLC, a company under common ownership. This presents a conflict of interest because Mrs. Wells has an incentive to encourage clients to use Trust Protector services for additional compensation received for additional services. You are under no obligation to use any services provided by Trust Protector. Mrs. Wells is not actively engaged in any noninvestment-related business or occupation that requires a substantial amount of her time.

**Item 5 Additional Compensation:**

Mrs. Wells does not receive any material compensation from noninvestment related activities.

**Item 6 Supervision:**

Mrs. Wells is an advisory representative and a compliance officer the firm. Mr. Wells, who is the CEO and her husband, is senior to Mrs. Wells. His telephone number is 863-294-3361. Mr. Wells shares responsibility for supervision of the individuals providing investment advice to clients with Ms. Wells. Given the number of clients and employees at the firm, supervision is performed on an individual basis.

**Item 7 Requirements for State-Registered Advisers:**

Mrs. Wells has never been subject to an award or has otherwise been found liable in any arbitration claim involving an investment or an investment-related business activity; fraud, false statement(s), or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices. Mrs. Wells has never been subject to an award or has otherwise been found liable in any civil, self-regulatory organization, or administrative proceeding involving an investment or an investment-related business or activity; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices. Mrs. Wells has never been the subject of a bankruptcy petition.