

Item 1: Cover Page Supervised Person Brochure

Part 2B of Form ADV

Jose M. Valenzuela, MBA



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This brochure provides information about Jose M. Valenzuela and supplements the CPR Investments Inc. brochure. You should have received a copy of that brochure. Please contact Jose M. Valenzuela if you did not receive CPR Investments Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Jose M. Valenzuela (CRD #2425543) is available on the SEC's website at www.adviserinfo.sec.gov.

July 7, 2021

Brochure Supplement (Part 2B of Form ADV)**Supervised Person Brochure**

Jose M. Valenzuela, MBA

- Year of birth: 1959
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Item 2: Educational Background and Business Experience

Educational Background:

- Nova Southeastern University, MBA, 1990
- Florida Atlantic University, BSEE, 1985

Business Experience:

- CPR Investments Inc., Investment Advisor Representative, October 2017 to Present
 - Valenzuela Financial Management Group, Insurance Agent, September 1993 to Present
 - Professional Mortgage Alliance, Mortgage Loan Originator, January 2016 to Present
 - My Financial Practice; Sales; January 2021 to Present
 - 123College, College Consultant, January 2012 to Present
 - J.A.D. Inc., Owner, January 2000 to Present
 - Mid Atlantic Financial Management, Inc., Investment Advisor Representative, July 2014 to October 2017
 - HBW Advisory Services LLC, Investment Advisor Representative, July 2010 to July 2014
 - HBW Securities LLC, Registered Representative, January 2010 to November 2011
 - PFS Investments Inc., Registered Representative, January 1994 to January 2010
 - Primerica Financial Services, Insurance Agent, April 1993 to January 2010
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Item 3: Disciplinary Information

Criminal Action: None to report.

Administrative Proceedings: None to report.

Self-Regulatory Organization Proceedings: None to report.

Item 4: Other Business Activities Engaged In

Jose M. Valenzuela is a licensed insurance agent with Valenzuela Financial Management Group. Approximately 50% of his time is spent on these activities. From time to time, he will offer clients products and/or services from this activity

This represents a conflict of interest because it gives an incentive to recommend products and services based on the commission and/or fee amount received. This conflict is

mitigated by the fact that Mr. Valenzuela has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products or services. Clients have the option to purchase these products or services through another insurance agent.

Jose M. Valenzuela is also a consultant for 123College, a salesman for My Financial Practice and a Mortgage Loan Originator for Professional Mortgage Alliance. Mr. Valenzuela may solicit these services to clients of CPR Investments Inc. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first and the Clients are not required to purchase any products or services. Clients have the option to purchase these products and services through other firms of their choosing.

J.A.D. Inc. is a pass-through company for Mr. Valenzuela's insurance and investment advisory business.

Item 5: Additional Compensation

Jose M. Valenzuela receives additional compensation/commissions as an insurance agent, Mortgage Loan Originator, College Consultant, and in his sales role. He does not receive any performance-based fees.

Item 6: Supervision

Jose M. Valenzuela is supervised by Charles P Reinhold sole owner and operator of CPR Investments Inc. The services offered by Jose M. Valenzuela will consider client's risk tolerance by using a questionnaire to determine Asset allocation and recommend models/strategies for investment planning based on the risk tolerance score results. Clients are reminded quarterly to update CPR Investments Inc. of any changes in their risk tolerance. Charles Reinhold monitors all model/strategies offered by CPR Investments Inc. on a regular basis.

Charles Reinhold can be reached at 800-213-1164.