

ITEM 1 – COVER PAGE



GLOBAL  
WEALTH  
STRATEGIES &  
ASSOCIATES

**Bradley Robert Scoular, AIF<sup>®</sup>, CLU<sup>®</sup>, CLTC**

**Global Wealth Strategies & Associates, LLC.**

**3200 Cherry Creek South Drive, Suite 280**

**Denver, Co 80209**

**Phone: (720) 420-4870**

**November 1, 2021**

**Part 2B Brochure**

This brochure supplement provides information about Global Wealth Strategies & Associates (“GWSA”) that supplements our brochure. You should have received a copy of that brochure. Please contact us at (720) 420-4870 or [adam@globalwealthstrategies.io](mailto:adam@globalwealthstrategies.io) if you did not receive Global Wealth Strategies & Associates, LLC brochure or if you have any questions about the contents of this supplement. Additional information about Bradley Scoular is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD# 4802322.

## ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

**Bradley R. Scoular, AIF®, CLU®, CLTC**

**Year of Birth:** 1980

**Educational Background:**

- 2003: Loyola Marymount: B.A.

**Business Background:**

- *Global Wealth Strategies, LLC.*, Investment Adviser Representative, 08/2021-Present
- *MML Investor Services, LLC.*, Registered Representative, 03/2017-08/2021
- *MassMutual Life Insurance Co.*, Insurance Agent , 07/2016-08/2021
- *MetLife Securities Inc.*, Financial Adviser , 06/2015-03/2017
- *Ameriprise Financial Services*, Investment Adviser , 05/2013-10/2013
- *Northwestern Mutual Investment Services, LLC.*, Broker Dealer, 11/2004-01/2009

**Professional Designations:**

- <sup>1</sup>CLU®, Chartered Life Underwriter, 2009
- <sup>2</sup>AIF®, Accredited Investment Fiduciary, 2021
- <sup>3</sup>CLTC, Certified Long-Term Care, 2016

**<sup>1</sup>Minimum Qualifications for the Chartered Life Underwriter® (CLU®) Designation**

CLU® is offered by The American College. This is a professional designation for individuals who specialize in life insurance and estate planning. Current applicants must complete five core courses and three elective courses, and successfully pass all eight two-hour, 100- question examinations in order to receive the designation. Candidates must also meet experience requirements and ethics standards, and agree to comply with The American College Code of Ethics and Procedures. Three years of full-time business experience is required. The three-year period must be within the five years preceding the date of the award.

**<sup>2</sup>Minimum Qualifications for the Accredited Investment Fiduciary (AIF®) Designation**

Accredited Investment Fiduciary are held by the Center for Fiduciary Studies, LLC, a Fiduciary360 (fi360) company. The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. AIF certification requirements include: Completion of Accredited Investment Fiduciary training, Successful completion of the AIF comprehensive Exam and Formal recognition of the Designee Code of Ethics.

**<sup>3</sup>Minimum Qualifications for Certification for Long Term Care CLTC Designation**

The CLTC® is issued by the CLTC Board of Standards, Inc. The Certification in Long-Term Care (CLTC) designation was created in 1999. The area of long-term care is primarily focused on the tolls of providing care over a prolonged period of time. A professional with a CLTC® designation has acquired the critical tools necessary to discuss the subject of longevity and its acute consequences on a client's family – financially, physically and emotionally. Those with a CLTC designation offer advice that leads to a plan to mitigate those consequences. To earn the CLTC® designation, a person will need to pass the 100-question multiple choice online exam.

### ITEM 3 – DISCIPLINARY INFORMATION

Bradley Scoular has no history of any legal or disciplinary events that deems to be material to a client's consideration of Bradley Scoular to act as their investment adviser representative. FINRA's BrokerCheck® is a resource available to review the disciplinary history of Bradley Scoular. <https://brokercheck.finra.org/>

### ITEM 4 – OTHER BUSINESS ACTIVITIES

Bradley Scoular holds an insurance license to sell insurance products. It is anticipated that a small portion, less than (10%) of his time, will be spent providing these insurance products. He will receive compensation from selling insurance products and therefore receive economic benefit for this activity. This activity may create a conflict of interests with clients. The client is under no obligation to purchase insurance through Bradley Scoular on a commissionable basis. To address this, disclosure is made to the client at the time purchase is made, identifying the nature of the transaction or relationship, the role to be played and any compensation to be paid by the client and/or received by the insurance agent. Clients have the right to decide whether to act on the recommendation and the right to purchase any insurance products through the insurance agent of their choice. The Firm and its Investment Adviser Representative will always act in the best interest of the client.

Bradley Scoular is managing member of R & B Properties, LLC. This entity is used for his personal real estate investments. This activity is not investment related and Mr. Scoular spends less than 5% of his time each month in his role.

Bradley Scoular is the owner of Bradley Scoular Designs. In his role, he designs and crafts wood working pieces that he in-turn sells. This is a non-investment related activity in which Mr. Scoular spends 20 hours per month.

Bradley Scoular manages a real estate investment property in Culver City, CA. This activity is not investment related and Mr. Scoular spends less than 5% of his time each month in his role.

### ITEM 5 – ADDITIONAL COMPENSATION

Bradley Scoular does not receive additional compensation beyond the scope of his role as your investment adviser representative and items listed in Item 4.

### ITEM 6 – SUPERVISION

Bradley Scoular is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Chief Compliance Officer, Adam Way, who is responsible for administering the policies and procedures. As Chief Compliance Officer, Adam Way reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed.

Adam Way may be reached at 720-420-4876.