



Form ADV Part 2B – Brochure Supplement

for

**Maria G Fliess
6123 Green Bay Road, Suite 210
Kenosha, Wisconsin 53142**

(262) 764-4816

Effective: January 15,2024

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Maria G Fliess (CRD# 4566355) in addition to the information contained in the Portfolio Medics, LLC (“Portfolio Medics” or the “Advisor”) (CRD # 145958) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Portfolio Medics Disclosure Brochure or this Brochure Supplement, please contact us at (239) 444-1766.

Additional information about Ms.Fliess is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Ms. Maria Fliess is an Investment Advisor Representative of Portfolio Medics. Ms. Fliess, born in August of 1967, is dedicated to advising Clients of Portfolio Medics. Ms. Fliess graduated from Union Grove High School in 1985.

Licensing and Examinations

Series 65, February 2013

Life Underwriter Training Council Fellow (LUTCF) June 2008.

The qualification and educational requirements include being a member of local association of NAIFA, completion of six courses (one required and 5 electives), and passing an online exam. Continuing education requirements include three hours of ethics-related continuing education every two years.

Retirement Income Certified Professional (RICP) March 2023.

The qualification and educational requirements include three years of relevant professional experience and a high school diploma or equivalent, three online self study courses, closed-book proctored final course exam, and thirty hours every two years, including one hour of ethics continuing education.

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	01/2024 to Present
Investment Advisor Representative, Brookstone Wealth Advisors	07/2016 to 01/2024
Owner, Retirement Advocates Inc.	02/2017 to Present
Investment Advisor Representative, Wealth Financial Advisory Services	01/2013 to 07/2016
Owner, Fliess Financial Services	08/2007 to 02/2017

Item 3 – Disciplinary Information

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As previously noted, there are no legal, civil or disciplinary events to disclose regarding Ms. Fliess.

However, we do encourage you to independently view the background of Ms. Fliess on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for her individual CRD # 4566355.

Item 4 – Other Business Activities

Ms. Fliess has the following Outside Business Activities: She is an independent insurance broker through Retire Advocates Inc.. In this role she sells insurance products including annuities. She spends approximately 50 hours per month in this endeavor during both market and non-market hours.

Item 5 – Additional Compensation

Ms. Fliess does not receive additional compensation from any other outside business activity other than those listed above.

Item 6 – Supervision

Ms. Fliess serves as an Investment Advisor Representative of Portfolio Medics and is supervised by John Billy, the Chief Compliance Officer. John Billy can be reached at (239) 444-1766.

Portfolio Medics has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of Portfolio Medics. Further, Portfolio Medics is subject to regulatory oversight by various agencies. These agencies require registration by Portfolio Medics and its employees. As a registered entity, Portfolio Medics is subject to examinations by regulators, which may be announced or unannounced. Portfolio Medics is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Item 7 – Requirements for State Registered Advisors

Ms. Fliess does not have any additional information to disclose.