



Form ADV Part 2B – Brochure Supplement
for

Maria Garza
104 N Pearl Street
Belton, TX 76513

Effective: October 1, 2024

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Maria Garza (CRD# 5754484) 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. Garza 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 Garza is an Investment Advisor Representative of Portfolio Medics. Ms. Garza, born in November of 1955, is dedicated to advising Clients of Portfolio Medics and graduated in May of 1974 from Harlandale High School.

Licensing and Examinations

Series 65, July 2015

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	10/2024 to Present
Owner, Platinum Tax Advisory	09/2013 to Present
Independent Insurance Agent, Various Firms	01/2009 to Present

Item 3 – Disciplinary Information

Ms. Garza does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation of its advisory business or the integrity of its management. Ms. Garza's FINRA Brokercheck may have additional information regarding the disciplinary history of Maria Garza that is not included in this brochure supplement (<http://brokercheck.finra.org>).

Item 4 – Other Business Activities

Ms. Garza has the following Outside Business Activities. Owner of Platinum Tax Advisory, where Ms. Garza provides tax preparation services for a variety of clients. She spends approximately 30 hours a week in this endeavor during both market and non-market hours. She is also an independent insurance agent for a variety of firms where she transacts in insurance products for individuals. She spends approximately 5 hours a week during market and non-market hours on this activity.

Item 5 – Additional Compensation

Ms. Garza does not receive additional compensation other than what is listed above.

Item 6 – Supervision

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