



Form ADV Part 2B – Brochure Supplement
for

Omar Rojas
503 Aileen Drive
Red Oak, Texas 75154

Effective: October 7, 2024

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Omar Rojas (CRD# 6331293 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 Mr. Rojas is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Mr. Omar Rojas is an Investment Advisor Representative of Portfolio Medics. Mr. Rojas, born in December 1968, is dedicated to advising Clients of Portfolio Medics and received his GED from the Texas Education Agency in 2012.

Licensing and Examinations

Series 65, June of 2018

Certified Financial Education Instructor, (CFEI)

The Certified Financial Education Instructor is issued by the National Financial Educators Council (NFEC). This designation requires twelve hours of NFEC administered coursework(online or in person), an additional eight hours may be required for those lacking financial experience.

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	10/2024 to Present
Driver, Modern Transportation	09/2023 to Present
Investment Advisor Representative, Efficient Plan	03/2020 to 12/2022
Driver, Freight/YRC Inc	06/2015 to 08/2023
Sales, Legacy Financial Services	01/2014 to 03/2020

Item 3 – Disciplinary Information

Mr. Rojas had a bankruptcy event. This bankruptcy originated in May of 2017 and was discharged in August of 2017. Mr. Rojas' FINRA Brokercheck may have additional information regarding the disciplinary history of Omar Rojas that is not included in this brochure supplement (<http://brokercheck.finra.org>).

Item 4 – Other Business Activities

Mr. Rojas is a driver for Modern Transportation. In this role he is a driver for multiple individuals. He spends approximately 25 hours a week during market and non-market hours in this endeavor.

Item 5 – Additional Compensation

Mr. Rojas does not receive additional compensation other from any other outside business activity.

Item 6 – Supervision

Mr. Rojas 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

Mr. Rojas does not have any additional information to disclose.