



Form ADV Part 2B – Brochure Supplement
for

Bruce Kaserman
2500 Lakevale Drive
Vienna, Virginia 22181

Effective: November 15, 2020

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Bruce Kaserman (CRD# 1399350) 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. Kaserman is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Mr. Bruce Kaserman is an Investment Advisor Representative of Portfolio Medics. Mr. Kaserman, born in July of 1961, is dedicated to advising Clients of Portfolio Medics and graduated from SUNY in 1983 with a BA degree in American History.

Licensing and Examinations

Series 65, April 2015

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	09/2020 to Present
Insurance Broker, BGK Financial	01/2010 to Present
Representative, First Advisors National	01/2018 to 01/2020
Investment Advisor, Horter Investment Management	09/2016 to 12/2017
Investment Advisor, Regal Investment Advisors	04/2015 to 12/2015

Item 3 – Disciplinary Information

Mr. Kaserman was charged in April of 1998 with two counts of Criminal Mischief. In July of 1998 the two counts were reduced to a misdemeanor and restitution was paid and counts closed. Mr. Kaserman's FINRA Brokercheck may have additional information regarding the disciplinary history of Bruce Kaserman that is not included in this brochure supplement (<http://brokercheck.finra.org>).

Item 4 – Other Business Activities

Mr. Kaserman is an insurance broker through BGK Financial. He provides financial planning and sells financial products including life insurance and annuities. He spends approximately 30 hours a week during both market and non-market hours on this investment related endeavor.

Item 5 – Additional Compensation

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

Item 6 – Supervision

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