



Form ADV Part 2B – Brochure Supplement  
for

**Andrea Smalley  
705 Robin Glen Ct  
Colorado Springs, CO 80906**

**Effective: September 1, 2020**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Andrea Smalley (CRD# **5158188**) 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. Smalley is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 – Educational Background and Business Experience**

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Andrea Smalley is an Investment Advisor Representative of Portfolio Medics. Ms. Smalley, born in January of 1979, is dedicated to advising Clients of Portfolio Medics. Ms. Smalley graduated in 1997 from Silsbee High School.

### **Licensing and Examinations**

Series 66, 07/2019

### **Employment History:**

Investment Advisor Representative, Portfolio Medics, LLC	09/2020 to Present
Financial Advisor, Edward Jones	12/2018 to 08/2020
Solutions Specialist, USAA	10/2017 to 12/ 2018
Unemployed	08/2017 to 10/2017
Student, Martinshoe Germany	08/2013 to 08/2017
Student, Fort Leonard Wood	05/2011 to 08/2013
Contractor, Peyton Resource Group	03/2011 to 05/2011
Contractor, USAA	03/2011 to 05/2011
Unemployed	06/2010 to 03/2011

## **Item 3 – Disciplinary Information**

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Ms. Smalley 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. Smalley's FINRA Brokercheck may have additional information regarding the disciplinary history of Andrea Smalley that is not included in this brochure supplement (<http://brokercheck.finra.org>).

## **Item 4 – Other Business Activities**

Ms. Smalley is the owner of rental real estate property. She devotes three hours a week on this activity during non-market hours.

## **Item 5 – Additional Compensation**

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Ms. Smalley has additional business activities that are detailed in Item 4 above.

## **Item 6 – Supervision**

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Ms. Smalley 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**

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