



Form ADV Part 2B: Brochure Supplement

Cover Page – Item 1

Max Isaacman
Portsmouth-SmartLife Financial Group, LLC.
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This brochure supplement provides information about Max Isaacman that supplements the Portsmouth-SmartLife Financial Group, LLC brochure. You are entitled to receive a copy of that brochure as an Advisory Customer of Portsmouth-SmartLife. Please contact Randy Fox at 415-910-0477 if you did not receive the Brochure or if you have any questions about the contents of this or any Portsmouth-SmartLife Financial Group supplements.

Additional information about Max Isaacman is available at the SEC's website at: www.adviserinfo.sec.gov.

Educational Background and Business Experience – Item 2

Full Legal Name: Max Isaacman Born: 1939

Education: Rider College, B.S., Business Administration, 1957 – 1961

William Penn High School, Harrisburg, Pennsylvania., 1953 - 1957

Business Background:

Max Isaacman has been a broker and investment advisor for 50 years.

Portsmouth Financial. (2013 – present) East/West Securities (1998 to 2013)

Registered Representative for stocks & bonds (1984 – 1997)

Registered Representative for institutional & individual investors with several brokerage firms, including Merrill Lynch, Montgomery Securities, Wedbush Morgan, Rodman & Renshaw, Cruttendon Roth, & McClurg Capital. The Bank of California Vice President, Personal Trust & Investments Division. Business development officer for the money-management services of the bank. Prospected for new clients by cross-selling within the bank marketed money management services within tax-advantaged structures such as charitable remainder trusts.

Wrote financial articles for media sources such as Personal Investing News, the San Francisco Examiner, Investment Technology News & Delta Airlines Sky magazine.

LICENSES:

- Securities Representative, Series 7
- NYSE Branch Office Manager, Series 12
- Registered Options Principal, Series 4
- Uniform Securities Agent State Law, Series 63
- Uniform Investment Advisor Law, Series 65

Disciplinary Information – Item 3

Mr. Isaacman has a reportable occurrence under this item. The details of which can be found on FINRA's BrokerCheck system or the IAPD,. The BrokerCheck link is www.finra.org/brokercheck; the IAPD link is www.adviserinfo.sec.gov.

Other Business Activities – Item 4

AUTHOR/WRITER – Mr. Isaacman writes Novels and Investment related Books and Articles Since September 2001. Healthcare Logistics.

Additional Compensation – Item 5

Mr. Isaacman may receive additional compensation outside of Portsmouth-SmartLife Financial Group.

Supervision – Item 6

Max Isaacman is supervised under the firms Written Supervisory Procedures by Randy Fox, Chief Compliance Officer. Randy Fox can be reached at 415-910-0477.

Requirement for State-Registered Advisers – Item 7

Mr. Isaacman has been involved in an arbitration claim where his company Cowen and Co. was found to have a lack of supervision in assigning accounts. There was three account representatives assign to the clients accounts at separate times. The client asked for damages of \$500,000 for a period of time. The award for the customer was for \$251,978.50. Mr. Isaacman has had a Compromise that was satisfied on 9/30/13.