



Form ADV Part 2B – Brochure Supplement  
for

**Patrick Holmes**  
**442 South Main Street, Suite 07**  
**Mooreville, North Carolina, 28036**

**Effective: August, 14, 2021**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Patrick Holmes (CRD# **7028493**) 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. Holmes 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**

---

Patrick Holmes is an Investment Advisor Representative of Portfolio Medics. Mr. Holmes, born in December of 1989, is dedicated to advising Clients of Portfolio Medics. Mr. Holmes graduated in 2012 from the University of North Carolina in Charlotte.

### **Licensing and Examinations**

Series 66: 2019

### **Employment History:**

Investment Advisor Representative, Portfolio Medics, LLC	08/2020 to Present
Insurance Agent, Seven Two Insurance	06/2020 to Present
Realtor Agent, EXP Realty	12/2020 to Present
Insurance Agent, Consolidated Planning Guardian Life Insurance	11/2018 to 11/ 2019
Safety Manager, Wallace Framing Inc	01/2020 to Present
Registered Rep, Park Avenue Securities	02/2019 to 11/2019
Customer Rep, UPS	11/2019 to 12/2019
Financial Services Officer, State Employees Credit Union	08/2013 to 10/2018
Driver, Papa Johns USA	07/2018 to 08/2018
Busser, Darden Restaurants	12/2014 to 03/2016
Landscape Technician, Holmescaping Inc.	06/2008 to 06/2013
Student	08/2008 to 06/2012
Busser, Darden Restaurants	07/2011 to 07/ 2012
Official, UNC Charlotte Recreational Services	08/2010 to 04/2011

## **Item 3 – Disciplinary Information**

---

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

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

Mr. Holmes has the following Outside Business Activities (OBA). 1. He is an insurance agent through Seven Two Insurance. He spends approximately five hours a week in this market related endeavor during non-market hours. 2. Safety Manager, Wallace Framing, not investment related, 20 hours a week during non-market hours. 3. Agent, EXP Realty, approximately 1 hour a week.

## **Item 5 – Additional Compensation**

---

Mr. Holmes has additional business activities that are detailed in Item 4 above.

## **Item 6 – Supervision**

---

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