

# Portfolio Medics, LLC

27499 Riverview Center Blvd  
Bonita Springs, FL 34134  
Phone: (513) 984-9933  
Fax: (513)984-5219  
[www.portfoliomedics.com](http://www.portfoliomedics.com)

April 15, 2019  
FORM ADV PART 2B  
BROCHURE SUPPLEMENT

This brochure supplement provides information about Casey Croysdale that supplements the Portfolio Medics, LLC brochure. You should have received a copy of that brochure. Please contact John Michael Billy, Jr., Managing Member if you did not receive Portfolio Medics, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Casey Croysdale is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

The CRD number for Casey Croysdale is 4220694.

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## **Casey Croysdale**

Year of Birth: 1981

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

#### **Educational Background**

- Miami University of Ohio; Bachelor of Science in Finance; 2004

#### **Business Experience**

- Portfolio Medics, LLC; Investment Advisor Representative: 04/2019 – Present
- Horter Investment Management; Investment Advisor Representative; 09/2017 – 04/2019
- Unemployed; 05/2017 – 09/2017
- Touchstone Securities; Registered Representative; 08/2009 – 05/2017
- IFS Financial Services; Wholesaler; 08/2009 – 05/2017
- Natcity Investments, Inc.; Licensed Financial Consultant; 02/2009 – 08/2008
- Lifelong Investments, LLC; Registered Representative; 10/2008 – 12/2008
- WM. R. Pintaric & Associates, Inc.; Registered Representative/Manager; 08/2004 – 12/2008

#### **Professional Designations**

- Certified Financial Planner™ (CFP®); 2014  
The CFP program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP designation have attained a Bachelor's Degree from an accredited college or university, have completed an advanced college-level course of study on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning, and passed a CFP certification exam, which is administered in 10 hours over a 2-day period and includes case studies and client scenarios. In addition, candidates must complete at least 3 years of full-time financial planning related experience and adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards. The holder must also complete 30 hours of financial planning CPE credits every 2 years.

#### **Licensing & Examinations**

- Series 7; 2005
- Series 24; 2005
- Series 66; 2005

### *Item 3 Disciplinary Information*

Casey Croysdale has not had any legal or disciplinary events in their past. Clients and prospective clients can view the CRD records (registration records) for Casey Croysdale through the SEC's Investment Adviser Public Disclosure (IAPD) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The CRD number for Casey Croysdale is 4220694.

### *Item 4 Other Business Activities*

In addition to being an Investment Advisor Representative ("IAR") of Portfolio Medics, LLC, Casey Croysdale is licensed as an independent insurance agent under Trulip Planning LLC and Trulip Retirement Planning LLC. Casey Croysdale may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients.

Also, Portfolio Medics, LLC requires Casey Croysdale to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with Portfolio Medics, LLC.

Mr. Croysdale is also an official High School soccer referee. It is not investment related and he spends approximately 2 hours a week not during market hours on this activity.

### *Item 5 Additional Compensation*

Aside from the sales commissions paid by insurance companies to Casey Croysdale (see "Other Business Activities"), and nominal fee as a soccer referee, Casey Croysdale does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

### *Item 6 Supervision*

Casey Croysdale is supervised by the firm's Chief Compliance Officer Mr. Billy regarding any sales activities relating to Portfolio Medics, LLC.

### *Item 7 Items for State Registered Advisors*

Casey Croysdale has not been involved in any of the following:

- (1) An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500 involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;

(d) bribery, forgery, counterfeiting, or extortion; or

(e) dishonest, unfair, or unethical practices.

(2) An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

Casey Croysdale has never been the subject of a bankruptcy petition.

## *Disclosures*

### *Life and Annuity:*

Portfolio Medics, LLC does not guarantee or endorse any annuity or life insurance product or their performance. Insurance and annuity products are not sold through Portfolio Medics, LLC. Products are subject to the terms and conditions of the contractual language of the life and annuity companies.