



Form ADV Part 2B – Brochure Supplement  
for

**Cyril (Cy) Roseman**  
**5712 Baltimore Drive Suite 469**  
**La Mesa, CA 91972**

**Effective: December 25, 2020**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Cyril (CY) Roseman (CRD# **2268422**) 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. Roseman 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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Mr. Cyril (Cy) Roseman is an Investment Advisor Representative of Portfolio Medics. Mr. Roseman, born in August of 1936, is dedicated to advising Clients of Portfolio Medics. Mr. Roseman has obtained his PHD in Political Science from Princeton University in 1963.

### **Licensing and Examinations**

Mr. Roseman is a Certified Financial Planner(CFP) which was obtained in February of 1998.

### **Employment History:**

Investment Advisor Representative, Portfolio Medics, LLC	01/2021 to Present
Investment Advisor Representative, CPR Investments	08/2018 to 12/2020
Investment Advisor, Centaurus Financial, Inc.	02/2002 to 12/2017
Buyer, Cali Direct Shopping	06/2019 to Present
Driver, LYFT	01/2017 to Present
CEO Agent, Bridgewest Financial and Insurance	01/2001 to Present

## **Item 3 – Disciplinary Information**

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Mr. Roseman does have a legal or disciplinary event that is material to a client's or prospective client's evaluation of its advisory business or the integrity of its management. In August of 2003, while at Sentra Securities Corporation, Mr. Roseman entered arbitration regarding unsuitable investments and trading for a client. The case was settled through mediation in February 2006. Mr. Roseman's FINRA Brokercheck may have additional information regarding the disciplinary history of Cyril Roseman that is not included in this brochure supplement (<http://brokercheck.finra.org>).

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

Mr. Roseman has 3 outside business activities. He is a Driver for LYFT and provides local driving services. He spends approximately 40 Hours a month in this activity. Mr. Roseman is also an insurance agent for Bridgewest Finance and Insurance. It is investment related and he spends 45 hours a month during both market and non-market hours in this endeavor. Last, Mr. Roseman is an associate with Cali Direct Shopping where he shops for clients through Amazon. He spends 10 hours a month doing this during non-market hours.

## **Item 5 – Additional Compensation**

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Mr. Roseman does not receive additional compensation other than what is listed above in item 4.

## **Item 6 – Supervision**

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