



Form ADV Part 2B – Brochure Supplement  
for

**Jeffrey Tamas**  
**1620 Tamiami Trail Suite 100**  
**Port Charlotte, FL 33948**

**Effective: May 4, 2021**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Jeffrey Tamas (CRD# **6481613**) 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. Tamas 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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Jeffrey Tamas is an Investment Advisor Representative of Portfolio Medics. Mr. Tamas, born in June of 1975, is dedicated to advising Clients of Portfolio Medics. Mr. Tamas graduated in 1992 from the Brewster High School.

### **Licensing and Examinations**

Series 65 January 2020

### **Employment History:**

|   |                    |
|---|--------------------|
| Investment Advisor Representative, Portfolio Medics, LLC        | 05/2021 to Present |
| Investment Advisor Representative, Alphastar Capital Management | 02/2020 to 05/2021 |
| CEO, Ideal Retirement Solutions                                 | 08/2019 to Present |
| Financial Representative, Modern Woodmen of America             | 10/2014 to 01/2020 |
| Registered Representative, MWA Financial Services               | 05/2015 to 08/2019 |
| Exterminator, Pest Eliminators                                  | 09/2013 to 09/2014 |
| Family Pastor, Community Life Center                            | 06/2012 to 08/2013 |
| Family Pastor, Cross River Church                               | 03/2012 to 05/2012 |
| Children's Pastor, Echos' of Faith                              | 01/2011 to 02/2012 |

## **Item 3 – Disciplinary Information**

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

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

Mr. Tamas has the following Outside Business Activities; Insurance agent through Ideal Retirement Solutions, he devotes 20 hours a week on this activity during market hours. In this roll Mr. Tamas sells insurance products including annuities and life insurance

## **Item 5 – Additional Compensation**

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

## **Item 6 – Supervision**

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