



## **Form ADV Part 2B – Brochure Supplement**

**For  
Nicholas MacDonald**

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Effective: September 5, 2021**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Nicholas MacDonald (CRD # 6501089), 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. MacDonald 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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Nicholas MacDonald is an Investment Advisor Representative of Portfolio Medics. Mr. MacDonald, born in January of 1982, is dedicated to advising Clients of Portfolio Medics. Mr. MacDonald graduated in 2005 from Augustana University with a Bachelor of Arts in Philosophy. He also acquired in 2013 a Masters of International Business degree form Hult International Business School. .

### Licensing and Examinations:

Series 66; September 2015

### Designation:

Certified Financial Planner 2021. CFP®; The Certified Financial Planner (CFP®) Board of certification process includes requirements in Education, Experience, Ethics and passing the CFP® certification examination.

### Employment History:

Independent Advisor Representative, Portfolio Medics, LLC	09/2021 to Present
Principal, MacDonald-Wu Financial	07/2021 to Present
Financial Professional. Midwest Secure Retirement	07/2021 to Present
Insurance agent, Ameritas	07/2021 to Present
Student	05/2020 to 07/2021
Client Service Associate, Wells Fargo	01/2017 to 05/2020
Unemployed	08/2016 to 01/2017
Financial Advisor, Bank of America Merrill Lynch	05/2015 to 08/2016
Project Management Contractor, Spherion	04/2015 to 05/2015
Tax Preparer, H&R Block	01/2015 to 04/2015
Business Development Manager, Kingstone Capital	06/2014 to 01/2015
Unemployed	04/2014 to 06/2014
Tax Preparer, H&R Block	01/2014 to 04/2014
Unemployed	08/2013 to 01/2014
Student	09/2012 to 08/2013
Intern, ZH studio	01/2013 to 08/2013
Editorial Director, iTV	03/2011 to 09/2012
Principal Consultant, Shanghai Changmai Market	08/2009 to 09/2012

## Item 3 – Disciplinary Information

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In May of 2020, Mr. McDonald was discharged from Wells Fargo Clearing Services following allegations of trading in a clients account without first discussing the trade with the client or receiving authorization to enter the trade.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices.

We do encourage you to independently view any additional information and the background of Mr. MacDonald on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching for his individual name.

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

Mr. MacDonald is also an independent insurance agent where he purchases insurance and insurance products for clients through Ameritas Insurance. He spends approximately 10 hours a week during market and non-market hours in this activity. Mr. MacDonald also conducts consulting, planning and investing through his “Do Business As” (DBA) entity MacDonald Wu Financial. This business is facilitated through Midwest Secure Retirement. He spends approximately 20 Hours a month in this endeavor during market and non-market hours.

#### **Item 5 – Additional Compensation**

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Mr. MacDonald receives no other compensation other than what is described above.

#### **Item 6 – Supervision**

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