



## Form ADV Part 2B – Brochure Supplement

for

**Richard Bryan Simpson  
40 Rahling Circle  
Little Rock, AR 72223  
(501) 951-0208**

**Effective: September 9, 2022**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Richard Bryan Simpson (CRD# **2451373**) 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. Simpson 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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Richard Simpson is an Investment Advisor Representative of Portfolio Medics. Mr. Simpson, born in June of 1960, is dedicated to advising Clients of Portfolio Medics. Mr. Simpson graduated in 1984 from the University of Arkansas with a BS in Education.

### **Licensing and Examinations**

Series 65 2/17/1997

### **Employment History:**

Investment Advisor Representative, Portfolio Medics, LLC	06/2020 to Present
Agent, Financial Dynamics	04/1991 to Present
Registered Representative, Retirement Wealth Advisors	03/2012 to 04/2020
Investment Advisor Representative, Dynamic Financial Management	05/2008 to 03/2012
Investment Advisor Representative, Jonathan Roberts Advisory	08/2011 to 03/2012
Registered Investment Advisor, J.W. Cole Financial	07/2011 to 03/2012

## **Item 3 – Disciplinary Information**

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

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

Mr. Simpson has the following Outside Business Activities; Insurance agent through Financial Dynamics, he devotes forty hours a week on this activity during market hours. In this roll Mr. Simpson sells insurance products including annuities and life insurance

## **Item 5 – Additional Compensation**

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

## **Item 6 – Supervision**

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

