



Form ADV Part 2B – Brochure Supplement

for

**David Wagner
17652 Passionflower Circle
Claremont, FL 34717
(708) 646-3468**

Effective: September 28, 2022

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of David Allen Wagner (CRD# 1681562), 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. Wagner is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

David Allen Wagner. is an Investment Advisor Representative of Portfolio Medics. Mr. Wagner, born in May of 1954, is dedicated to advising Clients of Portfolio Medics. Mr. Wagner graduated from Wabash College with a BS in Mathematics in June of 1976 and with an Masters in Business Administration (MBA), from Keller Graduate School of Management in 1986

Licensing and Examinations

Series 65 April 1998

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	09/2022 to Present
Managing Member, Active Investment Management, LLC	06/2016 To Present
Financial Advisor, Ridgeway Conger Advisory Services, Inc	01/2012 to 08/2016
Registered Rep, Ridgeway Conger, Inc	01/2012 to 05/2016

Item 3 – Disciplinary Information

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

Item 4 – Other Business Activities

Mr. Wagner has the following Outside Business Activities; Financial Market signal provider through Active Investment Management LLC. In this role Mr. Wagner provides investment signals to other Registered Investment Advisors (RIA'S). Since Active Investment Management LLC, only offers trading signals to RIA's, there is no conflict of interest. He spends approximately 80 hours a month during market and non-market hours on this activity.

Item 5 – Additional Compensation

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

Item 6 – Supervision

Mr. Wagner 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

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