



## Form ADV Part 2B – Brochure Supplement

for

**James Todd Newton  
1023 Sherman Street, SE  
Decatur, Alabama 35601**

**Effective: August 29, 2023**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of James Todd Newton (CRD# 1196025) 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. Newton 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. James Todd Newton is an Investment Advisor Representative of Portfolio Medics. Mr. Newton, born in August 1961, is dedicated to advising Clients of Portfolio Medics and graduated from Wake Forest University in 1983 with a BA in Economics.

### **Licensing and Examinations**

Series 65, May 1994

### **Employment History:**

Investment Advisor Representative, Portfolio Medics, LLC	08/2023 to Present
Owner, PayLink IRA	10/2018 to Present
Owner, Newton Institutional	10/2018 to Present
Investment Advisor Representative, Barlas O'Reilly Wealth Mgmt.	07/2022 to 12/2022
Financial Advisor, Plan Partners	08/2020 to 07/2022
Wholesaler, Director Strategic Accounts, Equis Capital	12/2014 to 10/2018
Financial Advisor, IFS Financial Advisors	01/2014 to 12/2014
Financial Advisor, IJL Financial Advisors	04/2011 to 01/2012
Founder, Deacon Consulting	02/2012 to 10/2020

## **Item 3 – Disciplinary Information**

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***There are no legal, civil or disciplinary events to disclose regarding Mr. Newton.*** Mr. Newton has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Newton.

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. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Newton.***

However, we do encourage you to independently view the background of Mr. Newton on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching for his individual CRD # **1196025**.

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

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Mr. Newton has the following Outside Business Activities:

1. Owner, Newton, Institutional. Where he transacts in insurance products to individuals. He spends approximately 20 hours a month during market and non-market hours in this endeavor.
2. Owner/Operator PayLink IRA. Provides payroll and IRA services to individuals and business. He spends approximately 10 hours a month on this activity.

## **Item 5 – Additional Compensation**

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Mr. Newton does not receive additional compensation other from any other outside business activity than those listed above.

## **Item 6 – Supervision**

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Mr. Newton 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.

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#### **Item 7 – Requirements for State Registered Advisors**

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