



Form ADV Part 2B – Brochure Supplement
for

Michael Tran
8411 Westminster Blvd.
Westminster, CA 92683
(714) 225-2607

Effective: October 07, 2023

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Michael Tran (CRD# 7815425) 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. Tran is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Mr. Michael Tran is an Investment Advisor Representative of Portfolio Medics. Mr. Tran, born in January of 1974, is dedicated to advising Clients of Portfolio Medics. Mr. Tran graduated in 1998 from the University of California, Los Angeles with a BS in Biochemistry.

Licensing and Examinations

Series 65 9/14/2023

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	10/2023 to Present
Agent, LifePro Financial Services	06/2019 to Present
Consultant, Soluteks Inc.	04/2014 to Present
Unemployed	07/2013 to 04/2014

Item 3 – Disciplinary Information

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

Item 4 – Other Business Activities

Mr. Tran has the following Outside Business Activities; Insurance agent through LifePro Financial, he devotes twenty hours a week on this activity during both market and non-market hours. In this roll Mr. Tran sells insurance products including annuities and life insurance. He is also a Software Consultant for Soluteks Inc., in this role he provides software solutions to existing and potential new clients of Soluteks Inc. and spends approximately 3 hours a week during market and non-market hours in this endeavor.

Item 5 – Additional Compensation

Mr. Tran does not receive additional compensation other than what is listed in Other Business Activities.

Item 6 – Supervision

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

