



Form ADV Part 2B – Brochure Supplement

for

**Joseph Sullivan
916 Silver Glen Road
McHenry, IL 60050
(815) 242-0121**

Effective: October 07, 2023

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Joseph L Sullivan (CRD# 2829640) 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. Sullivan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Mr. Joseph L Sullivan is an Investment Advisor Representative of Portfolio Medics. Mr. Sullivan, born in October of 1972, is dedicated to advising Clients of Portfolio Medics. Mr. Sullivan graduated in 1999 from Winona State University with a BS in Finance.

Licensing and Examinations

Series 65 9/22/2023

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	10/2023 to Present
Insurance Agent, Bedrock Financial Services	03/ 2023 to Present
Insurance Agent, JB Growth Partners, LLC	03/2023 to 10/2023
Registered Representative, SagePoint Financial	10/2022 to 08/2023
Registered Representative, SA Stone Wealth Management	10/2021 to 09/2022
Office Manager, WilSave Financial	03/2021 to 08/2021
Registered Representative, American Enterprise Investment Services	02/2019 to 03/2021
Service Professional II, Ameriprise Financial Services.	11/2010 to 02/2019

Item 3 – Disciplinary Information

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

Item 4 – Other Business Activities

Mr. Sullivan is also an insurance agent through Bedrock Financial Services. In this role Mr. Sullivan will be transacting in insurance products including annuities. He will spend approximately 20 hours a month during market and non-market hours in this endeavor.

Item 5 – Additional Compensation

Mr. Sullivan does not receive additional compensation other than what is listed in item 4, Outside Business Activities.

Item 6 – Supervision

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