PORTFOLIO MEDICS

About Us

It wasn't just portfolio values that eroded in the last market downturn. The trust investors had placed in the market and with the firms that operate there eroded as well.

Today, investors demand greater accountability from portfolio managers and investment advisors. They expect fuller transparency for their accounts and portfolios.

At Portfolio Medics, we're committed to both.

PORTFOLIO MEDICS

OUR CORE TEAM

John Billy, Partner

John Conrath, Partner

Steven Landis, CFP

Who We Are

Portfolio Medics is a fee-only registered investment advisory firm based in Bonita Springs, FL. We serve as fiduciaries for our clients, representing their individual interests in all investment decisions we make on their behalf.

Our staff brings together the intelligence and expertise of professional investment associates from across the country. The principals of our firm combine 40+ years of experience in investment advisory practice and portfolio development.

What We Do

We work with multiple outside money managers to bring sophisticated investment strategies within reach of everyday investors -- strategies that are typically beyond the scope of traditional buy-and-hold portfolios. By turning to these managers, we are able to eliminate conflicts of interest and keep client goals the focus of our investment strategies.

We perform the necessary due diligence on these managers to understand their methodoliges and scrutinize the viability of their investment strategies given the existing market climate. Only those managers who we believe are well-positioned to provide strong returns are included in our clients' portfolios.

How We Do It

We believe that investment success shouldn't be tied to uncontrollable forces, such as systematic market risk. An active approach to portfolio management through the use of low correlated and non-traditional asset classes helps our clients seek opportunities for returns through all phases of each market cycle.

To learn more about how to join the Portfolio Medics team visit www.portfoliomedics.com