



Form ADV Part 2B – Brochure Supplement

for

**Patrick J Fortunato
1568 N Main Street, 2nd Floor
Palmer, MA 01069
(203) 377-4311**

Effective: September 30, 2025

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Patrick J Fortunato (CRD# **1651450**) 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. Fortunato is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Patrick J Fortunato is an Investment Advisor Representative of Portfolio Medics. Mr. Fortunato, born in June of 1958, is dedicated to advising Clients of Portfolio Medics. Mr. Fortunato graduated in 1981 from the University of New Haven with a Business Management Degree.

Licensing and Examinations

Series 65 July 2023

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	10/2025 to Present
President, Global Financial Network	04/2008 to Present
Sales, Legal Shield	06/2014 to Present
IAR, Sequent Planning	09/2025 to 09/2025
Sales, Primerica Financial	06/2021 to 06/2025

Item 3 – Disciplinary Information

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

Item 4 – Other Business Activities

Mr. Fortunato has the following Outside Business Activities: Insurance agent through Global Financial Network. Here, he devotes fifteen hours a week on transacting in insurance products including annuities. He spends approximately 15 hours a month during market and non-market hours on this activity. Sales Representative for Legal Shield. In this role Mr. Fortunato sells legal and identity theft services to clients. He spends approximately 20 hours a month in this endeavor.

Item 5 – Additional Compensation

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

Item 6 – Supervision

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