



**Form ADV Part 2B – Brochure Supplement**  
**for**

**Enri D. Santee**  
**10879 Poyntell Circle**  
**San Diego, CA 92131**  
**(907) 947-6552**

**Effective: November 16, 2024**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Enri D Santee (CRD# 5541001) 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.Santee 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. Enri D Santee is an Investment Advisor Representative of Portfolio Medics. Mr. Santee, born in December 1983, is dedicated to advising Clients of Portfolio Medics. Mr. Santee graduated in 2015 with an Associates Degree in Business Management from Victor Valley College and in 2018 from San Diego State University with a BS in Business Management.

### **Licensing and Examinations**

Series 65, July 2019

### **Employment History:**

Investment Advisor Representative, Portfolio Medics, LLC	11/2021 to Present
Independent Insurance Agent, One America Insurance	11/2021 to 02/2023
Operating Engineer, International Union of Operating Engineers Local 12	01/2023 to Present
Site Coordinator, Equus Workforce	12/2020 to 02/2023
Wealth Advisor, Trilogy Financial Services, Inc	04/2019 to 11/2020
Director, Rockport Healthcare	12/2015 to 12/2017
Ensign Services, HR Management	10/2017 to 04/2019
Assistant Administrator, Apple Valley Care Center	10/2012 to 12/2015
Overnight Operations, La Valencia Hotel	09/2011 to 10/2012

## **Item 3 – Disciplinary Information**

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Mr.Santee has no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business. Also, Mr. Santee has not been involved in a criminal or civil action in a domestic, foreign or military court of competent jurisdiction, an administrative proceeding before the SEC, or any other federal regulatory authority, and/or a self-regulatory organization (SRO) proceeding. Mr. Santee's FINRA Brokercheck may have additional information regarding the disciplinary history of Enri Santee that is not included in this brochure supplement (<http://brokercheck.finra.org>).

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

Mr. Santee is an Operating Engineer through International Union of Operating Engineers Local 12. In this role he operates a variety of construction equipment. He spends approximately 30 hours a month during non-market hours in this endeavor.

## **Item 5 – Additional Compensation**

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Mr. Santee does not receive additional compensation other from any other outside business activity.

## **Item 6 – Supervision**

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Mr. Santee 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**

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