

January 1, 2024

Brochure Supplement

This Brochure Supplement provides information about Lee E. Munson that supplements the Portfolio LLC Brochure.

You should have received a copy of that Brochure.

Please contact:

Lee Munson, Managing Principal at (505) 884-3445 or lee@portfoliollc.com if you did not receive Portfolio LLC's Brochure or if you have any questions about the content of this supplement.

Additional information about:

Lee E. Munson is available on the SEC's website at www.adviserinfo.sec.gov

Managing Principal: Lee E. Munson, CFA, CFP®

Portfolio, LLC dba Portfolio Wealth Advisors

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Item 2

Educational Background and Business Experience

Lee E. Munson, Born 04/1975 Education and Professional Designation Background B.A. in Liberal Arts: St. John's College - Santa Fe, New Mexico – graduated in 1997 Chartered Financial Consultant® (CFA®) Charter holder since September 2006 Obtained CERTIFIED FINANCIAL PLANNER™ certification in January 2004 Business Background 01/2008 to Present Portfolio LLC Managing Member & Investment Advisor Representative 04/2002 to 01/2008 Charles Schwab & Co., Inc., Financial Consultant

Item 3

Disciplinary Information

Registered investment advisors are required to disclose any material facts regarding any legal or disciplinary actions that would be material to your evaluation of each investment advisor representative providing investment advice to you. There is no information of this type to report.

Item 4

Other Business Activities

Mr. Munson's primary business is devoted to the services of the Advisor, and has no current outside business activities.

Item 5

Additional Compensation

Mr. Munson does not receive any economic benefit from any non-client for providing advisory services.

Item 6

Supervision

Lee E. Munson, Managing Principle, is responsible for the supervision of all investment personnel. His telephone number is (505) 884-3445.