

**Brochure Supplement**

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**Acacia Wealth Advisors, LLC**

SEC File No. 801-64174

**Alev T. Lewis**

**President & Chief Operations Officer**

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This brochure supplement provides information about Alev Lewis that supplements the Acacia Wealth Advisors, LLC, brochure. You should have received a copy of that brochure. If you did not receive an Acacia Wealth Advisors, LLC, brochure or if you have any questions about the contents of this supplement, please contact Amy Born at [aborn@acaciawealth.com](mailto:aborn@acaciawealth.com) or by phone at 310-246-0560.

Additional information about Alev Lewis is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background and Business Experience

Alev Lewis (b. 1962) is the President of Acacia Wealth Advisors, LLC, and one of two founding partners of the firm. She previously held the role of West Regional Director Wealth Strategist with Bank of America's Private Bank, and was responsible for providing comprehensive, integrated advice to high-net-worth individuals, business owners, executives and families in the greater Los Angeles area, extending from Westlake Village to Palm Desert.

Prior to joining Bank of America, Ms. Lewis worked at Ernst & Young, LLP. During her seven year tenure with the firm, Ms. Lewis worked as a senior manager providing all aspects of financial planning for high-net-worth individuals and their families, including the areas of income tax, gift tax, estate tax, business succession, philanthropy, and financial and investment planning. In this role she managed, trained and mentored a team of professionals, and worked closely with Meloni Hallock.

### A. Educational Background

MS, Taxation, Golden Gate University	2001
BA, Economics, University of California at Los Angeles	1986

### B. Professional Designations and Licenses

Certified Public Accountant (CPA) w/ Personal Financial Specialist (PFS)	1988
Certified Investment Management Analyst (CIMA)	1999

### C. Business Background

President, Chief Operations Officer, Acacia Wealth Advisors, LLC	
Chief Operations Office and Chief Compliance Officer Acacia Wealth Advisors, LLC	03/2005–12/2007
President, Chief Operations Officer and Chief Compliance Officer, Acacia Wealth Management, Inc.	01/2008–Present
Chief Operations Officer and Chief Compliance Officer Acacia Wealth Management, Inc.	03/2005–12/2007
Wealth Strategist, Bank of America, N.A.	08/2002–04/2005
Registered Representative Bank of America Investment Services, Inc.	08/2002–04/2004
Senior Manager, Ernst & Young, LLP	01/1996–08/2002

## **D. Professional Designations - Qualifications and Related Criteria**

### **D.1. Qualifications for Certified Public Accountant (CPA)**

One of the world's leading licensing examinations, the Uniform CPA Examination serves to protect the public interest by helping to ensure that only qualified individuals become licensed as Certified Public Accountants (CPAs). The exam is one of the "Three E's" – education, examination, and experience – that are required for licensure as a CPA. Consequently, passing the examination is not, in itself, sufficient to meet requirements for licensure.

**Licensing** The licensing authority and requirements for CPAs falls under the jurisdiction of the Board of Accountancy for the state, district, or country in which a CPA practices. In adherence to the AICPA mission, the Institute seeks the highest possible level of uniform certification and licensing standards while promoting and protecting the CPA designation. The national organization representing the state boards is the National Association of State Boards of Accountancy (NASBA).

**Requirements** The requirements, which are set by each state board of accountancy, include:

1. Completing a program of study in accounting at a college or university.
2. Passing the Uniform CPA Exam.
3. Obtaining a specific amount of professional work experience in public accounting (the required amount and type of experience varies according to licensing jurisdiction).

**Ethics** Upon joining the AICPA, a member agrees to abide by its Code of Professional Conduct and Bylaws adopted by a vote of the membership. The bylaws provide a structure for enforcement of the Code by the Institute's Professional Ethics Division. When allegations come to the attention of the Ethics Division regarding a violation of the Code, the division investigates the matter, under due process procedures, and depending upon the facts found in the investigation, may take a confidential disciplinary action, settle the matter with suspension or revocation of membership rights, or refer the matter to a panel of the Trial Board Division for a hearing. The bylaws mandate publishing the member's name if he or she is found guilty by a hearing panel, suspended, or expelled by settlement.

The bylaws of 51 state and/or territorial CPA societies provide for their participation in a Joint Ethics Enforcement Program so that, depending upon membership status, actions taken by one or more of these societies or the AICPA are in the names of both the society and AICPA. State regulatory agencies (Boards of Accountancy) issue practice licenses to CPAs and only those agencies may act to affect those licenses. The AICPA does not license CPAs. Those state regulatory agencies may take disciplinary action affecting practice licenses under statutes, regulations, and rulings of the state. Also, the Securities and Exchange Commission (SEC) and other Federal government agencies may, under Federal law or regulation, discipline CPAs who practice before these agencies.

### **D.2. Qualifications for Personal Financial Specialist (PFS)**

The requirements for the Personal Financial Specialist ("PFS") credential is established by the Personal Financial Planning ("PFP") staff at the AICPA, the National Accreditation Commission,

along with the PFS Credential Committee. The requirements accurately reflect the depth and breadth of experience and technical expertise required to obtain this credential. The five major requirements are:

1. Obtain a CPA license.
2. Complete comprehensive Personal Financial Planning (PFP) education.
3. Obtain a specified level of PFP experience.
4. Pass the PFP examination.
5. Every three years, all CPA/PFS must meet re-accreditation requirements to maintain their right to use the accreditation.

### **D.3. Qualifications for Certified Investment Management Analyst (CIMA)**

The CIMA certification program is the only credential designed specifically for financial professionals who want to attain a level of competency as an advanced investment consultant. The CIMA professional integrates a complex body of investment knowledge to provide objective investment advice and guidance to individuals and institutions. That knowledge is applied systematically and ethically to assist clients in making prudent investment decisions.

The CIMA certification program requires that candidates meet all eligibility requirements, including experience, education, examination and ethics. There are five steps that must be completed to earn the certification:

1. Submit the CIMA certification program application and fee and undergo a background check.
2. Pass the online qualification examination.
3. Schedule into and complete the education program with a registered education provider over a five-day period.
4. Submit the certification examination application and fee and pass the classroom certification examination.
5. Sign the licensing agreement, submit the initial certification fee, and agree to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks.

## **Item 3: Disciplinary Information**

Alev Lewis does not have any disciplinary action to report. Public information concerning Ms. Lewis's registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

#### **Item 4: Other Business Activities**

Ms. Lewis does not engage in outside business activities and devotes her full time and energy to the business of Acacia Wealth Advisors, LLC.

#### **Item 5: Additional Compensation**

Other than income derived from servicing Acacia's advisory clients, Ms. Lewis does not receive additional compensation.

#### **Item 6: Supervision**

Supervision of Ms. Lewis is performed by Amy Born in her capacity as Chief Compliance Officer, through reviews of internal transaction and security holdings reports, electronic and physical correspondence, and other internal reports as mandated by the firm and its regulatory authorities. Ms. Born can be reached at 310-246-0560.