

# Brochure Supplement

November 25, 2014

## ERIC T. LAI

1255 Treat Boulevard, Suite 300  
Walnut Creek, California 94597

(925) 215-5600

This Brochure Supplement provides information about Eric T. Lai that supplements the Disclosure Brochure of Archvest Wealth Advisors, Inc. (hereinafter "AWA"), a copy of which you should have received. Please contact AWA's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Eric T. Lai is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Archvest Wealth Advisors, Inc., a Registered Investment Adviser**

1255 Treat Boulevard, Suite 300, Walnut Creek, California 94597 | (925) 215-5600  
[www.archvestwa.com](http://www.archvestwa.com)

## Item 2. Educational Background and Business Experience

Born 1978

### Post-Secondary Education

UCLA Anderson School of Business | MBA | 2010

Southern California School of Culinary Arts | Associate, Occupational Studies | 2002

UCLA | B.A., Economics | 2000

### Recent Business Background

Archvest Wealth Advisors, Inc. | President and Chief Compliance Officer | August 2014 – Present

Watermark Asset Management | Financial Advisor | May 2003 – August 2014

### Professional Designation

Eric T. Lai holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

For additional information about this credential, please refer directly to the website of the issuing organization.

## Item 3. Disciplinary Information

AWA is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Eric T. Lai. AWA has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

AWA is required to disclose information regarding any investment-related business or occupation in which Eric T. Lai is actively engaged. AWA has no information to disclose in relation to this Item.

## **Item 5. Additional Compensation**

AWA is required to disclose information regarding any arrangement under which Eric T. Lai receives an economic benefit from someone other than a client for providing investment advisory services. AWA has no information to disclose in relation to this Item.

## **Item 6. Supervision**

Eric T. Lai is the President and Chief Compliance Officer of AWA and is generally responsible for his own supervision. Eric T. Lai seeks to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by AWA's clients.

## **Item 7. Requirements for State Registered Advisers**

AWA is required to disclose information regarding Eric T. Lai's involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. AWA has no information to disclose in relation to this Item.