

## **Brochure Supplement**

March 10, 2016

### **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	01/2008–Present
Chief Compliance Officer, Acacia Wealth Advisors, LLC	03/2005–02/2013
Chief Operations Officer, Acacia Wealth Advisors, LLC	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. Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most

states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

In addition to the Code of Professional Conduct, AICPA members who provide personal financial planning services are required to follow the Statement on Standards in Personal Financial Planning Services (the "Statement"). Most state boards of accountancy define financial planning as the practice of public accounting and therefore have jurisdiction over CPAs practicing in this discipline; state boards would likely look to the Statement as the authoritative guidance in this practice area regardless of specific or blanket adoption of AICPA standards.

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

The PFS credential demonstrates that an individual has met the minimum education, experience, and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, certificate, or permit, none of which are in inactive status; fulfill 3,000 hours of personal financial planning business experience; complete 75 hours of personal financial planning CPE credits; pass a comprehensive financial planning exam, and be an active member of the AICPA. A PFS credential holder is required to adhere to AICPA's Code of Professional Conduct and the Statement on Standards in Personal Financial Planning Services, when providing personal financial planning services. To maintain the PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

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

The Certified Investment Management Analyst (CIMA) designation focuses on asset allocation, ethics, due diligence, risk measurement, investment policy and performance measurement. Only individuals who are investment consultants with at least three years of professional experience are eligible to try to obtain this certification, which signifies a high level of consulting expertise. The Investment Management Consultants Association offers the CIMA courses.

To receive the CIMA certification, the individual must undergo a background check, pass the qualification examination, complete the education program with a registered education provider, pass the classroom certification examination, and agree to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. In order to maintain the CIMA designation, the individual must complete at least 40 hours of continuing education every two years.

### **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.