

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**October 2023**

**Isabella H. Tam**

**Beyond Wealth Advisory LLC**  
**3540 Callan Blvd, STE 208**  
**South San Francisco, CA, 94080**  
**[www.BeyondWealthAdvisory.com](http://www.BeyondWealthAdvisory.com)**

**Firm Contact:**  
**Isabella Tam**  
**Chief Compliance Officer**

This brochure supplement provides information about Ms. Tam that supplements our brochure. You should have received a copy of that brochure. Please contact Isabella Tam at 650-300-2089 if you did not receive Beyond Wealth Advisory LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Tam is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #7676950.

## Item 2: Educational Background & Business Experience

**Isabella Hil-Won Tam**

**Year of Birth:** 1996

### **Educational Background:**

- 2018: DePaul University; Bachelor of Arts in Public Relations & Advertising

### **Business Background:**

- 06/2023 – Present      Beyond Wealth Advisory LLC; Managing Member & Chief Compliance Officer
- 01/2020 – 06/2023      IEQ Capital, LLC; Senior Operations Associate
- 10/2018 – 12/2020      Fisher Investments; Securities Operations Associate
- 01/2009 – 09/2018      C&R Tam Tax Services; Tax Preparer Assistant

### **Exams, Licenses & Other Professional Designations:**

- 2023 - Series 65 Exam
- 2016 - California Tax Education Council (CTEC)

### **California Tax Education Council (CTEC):**

The California Tax Education Council (CTEC) was established by the California State Legislature to promote competent tax preparation within the State of California. CTEC is a California non-profit Corporation that registers tax preparers, the second largest segment of tax preparation professionals serving California, following certified public accountants. Anyone who, for a fee, assists with or prepares a state or federal income tax return, excluding certified public accountants, attorneys, enrolled agents, enrolled actuaries, and certain financial institutions or their employees, must be registered with CTEC. CTEC is also charged with approving providers of tax education and maintaining and distributing to the public a list of those approved providers. All CTEC registered tax preparers (CRTP) must complete 60-hours (45 hours federal and 15 hours state) of qualifying tax education from a CTEC Approved Provider; Obtain a PTIN (Preparer Tax Identification Number) from the IRS; Purchase a \$5,000 tax preparer bond; Register with CTEC within 18 months from the completion date on the certificate of completion and pay applicable registration fees. To renew registration all CRTPs must complete 20-hours (10 hours federal tax law, 3 hours federal tax update, 2 hours of Ethics and 5 hours for State) of continuing tax education each year; Maintain a valid PTIN (Preparer Tax Identification Number) from the IRS; Maintain a \$5,000 tax preparer bond; Renew the registration by October 31st of each year and pay applicable registration fees. The Board of Directors is comprised of unpaid volunteers appointed to the Board by certain Qualified Organizations. The Council includes several committees that carry out the work of the Council. The day-to-day work of the Council is carried out by the CTEC Administrator under a contract awarded by the Board of Directors.

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to your evaluation of Ms. Tam.

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

Ms. Tam has nothing to disclose in this regard.

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

Ms. Tam does not receive any other economic benefit for providing advisory services in addition to advisory fees.

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

Randy Tam, Managing Member of Beyond Wealth Advisory LLC, supervises and monitors Ms. Tam's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Randy Tam if you have any questions about Ms. Tam's brochure supplement at 650-300-2089.

#### **Item 7: Requirements for State-Registered Advisers**

Ms. Tam has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.

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**Randy S. Tam**

**Beyond Wealth Advisory LLC  
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South San Francisco, CA, 94080  
[www.BeyondWealthAdvisory.com](http://www.BeyondWealthAdvisory.com)**

**Firm Contact:  
Isabella Tam  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Tam that supplements our brochure. You should have received a copy of that brochure. Please contact Isabella Tam at 650-300-2089 if you did not receive Beyond Wealth Advisory LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Tam is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #1801326.

## Item 2: Educational Background & Business Experience

**Randy Shuwoon Tam**

**Year of Birth:** 1958

### **Educational Background:**

- 1983: San Francisco State University; Attended
- 1980: City College of San Francisco; Associate of Arts in Banking

### **Business Background:**

- 06/2023 – Present      Beyond Wealth Advisory LLC; Managing Member
- 10/2009 – 06/2023      Ameriprise Financial Services, Inc.; Registered Representative

### **Exams, Licenses & Other Professional Designations:**

- 2008 – Series 31 Exam
- 2006 – Series 65 Exam
- 2005 – CA Insurance License
- 2001 – Series 9 & Series 10 Exams
- 1997 – Series 63 Exam
- 1996 – Series 7 Exam
- 1995 – California Tax Education Council (CTEC)
- 1988 – Series 6 Exam

### **California Tax Education Council (CTEC):**

The California Tax Education Council (CTEC) was established by the California State Legislature to promote competent tax preparation within the State of California. CTEC is a California non-profit Corporation that registers tax preparers, the second largest segment of tax preparation professionals serving California, following certified public accountants. Anyone who, for a fee, assists with or prepares a state or federal income tax return, excluding certified public accountants, attorneys, enrolled agents, enrolled actuaries, and certain financial institutions or their employees, must be registered with CTEC. CTEC is also charged with approving providers of tax education and maintaining and distributing to the public a list of those approved providers. All CTEC registered tax preparers (CRTP) must complete 60-hours (45 hours federal and 15 hours state) of qualifying tax education from a CTEC Approved Provider; Obtain a PTIN (Preparer Tax Identification Number) from the IRS; Purchase a \$5,000 tax preparer bond; Register with CTEC within 18 months from the completion date on the certificate of completion and pay applicable registration fees. To renew registration all CRTPs must complete 20-hours (10 hours federal tax law, 3 hours federal tax update, 2 hours of Ethics and 5 hours for State) of continuing tax education each year; Maintain a valid PTIN (Preparer Tax Identification Number) from the IRS; Maintain a \$5,000 tax preparer bond; Renew the registration by October 31st of each year and pay applicable registration fees. The Board of Directors is comprised of unpaid volunteers appointed to the Board by certain Qualified Organizations. The Council includes several committees that carryout the work of the Council. The day-to-day work of the Council is carried out by the CTEC Administrator under a contract awarded by the Board of Directors.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Mr. Tam.

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

Mr. Tam is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Tam, as a fiduciary, will act in the client's best interest.

Mr. Tam is a co-owner of C&R Tam Tax & Information Services. He may offer tax services and receive customary fees as a result. A conflict of interest may arise as these tax services may create an incentive to recommend C&R Tam Tax & Information Services to clients based on the compensation earned. To mitigate this potential conflict, Mr. Tam, as a fiduciary, will act in the client's best interest.

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

Mr. Tam does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Isabella Tam, Managing Member & Chief Compliance Officer of Beyond Wealth Advisory LLC, supervises and monitors Mr. Tam's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Isabella Tam if you have any questions about Mr. Tam's brochure supplement at 650-300-2089.

### **Item 7: Requirements for State-Registered Advisers**

Mr. Tam has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.