

This brochure supplement provides information about Everest Wong that supplements the Tactivest, LLC brochure. You should have received a copy of that brochure. Please contact Everest Wong if you did not receive Tactivest, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Everest Wong is also available on the SEC's website at www.adviserinfo.sec.gov.

Tactivest, LLC

Form ADV Part 2B - Individual Disclosure Brochure

for

Everest Wong

Personal CRD Number: 3166711

Investment Adviser Representative

Tactivest, LLC
246 12th Ave, Apt 3
San Francisco, CA, 94118
(415) 752-7311
everest@tactivest.com

UPDATED 04/29/2026

Item 2: Educational Background and Business Experience

Name: Everest Wong **Born:** 1973

Educational Background and Professional Designations:

Education:

Bachelors English Literature, University of California - Berkeley - 1997

Business Background:

09/2014 - Present	Principle Managing Member Tactinvest, LLC
01/2015 - 04/2021	Registered Representative Aurora Private Wealth (APW)
11/2005 - 01/2015	Branch Manager LPL Financial
02/2003 - 11/2005	Financial Advisor Citicorp Investment Services

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Everest Wong is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Tactinvest, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Tactinvest, LLC in their capacity as a licensed insurance agent.

Everest Wong spends 1 hour per week of his time on those activities.

Everest Wong serves as CEO of Confetti Tech Ventures LLC, an AI-focused company, contributing limited hours monthly while expecting 1% of annual income from the business's artificial intelligence-driven applications.

Everest Wong holds a Durable Power of Attorney for Financial Affairs, spends one hour monthly on business during and outside trading hours, and expects 0 percent of annual compensation from it.

All material conflicts of interest under Section 260.238 (k) of the California Corporations Code are disclosed regarding the investment adviser, its representatives or any of its employees, which could be reasonably expected to impair the rendering of unbiased and objective advice.

Item 5: Additional Compensation

Everest Wong does not receive any economic benefit from any person, company, or organization, other than Tactinvest, LLC in exchange for providing clients advisory services through Tactinvest, LLC.

Item 6: Supervision

As a representative of Tactinvest, LLC, Everest Wong is supervised by Briann Peixoto, the firm's Chief Compliance Officer. Briann Peixoto is responsible for ensuring that Everest Wong adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Briann Peixoto is (415) 752-7311.