

*This brochure supplement provides information about Andrew James Stout that supplements the Tactivest, LLC d/b/a Stout Wealth Management brochure. You should have received a copy of that brochure. Please contact Andrew James Stout if you did not receive Tactivest, LLC d/b/a Stout Wealth Management 's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Andrew James Stout is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Tactivest, LLC d/b/a Stout Wealth Management**

**Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Andrew James Stout**

Personal CRD Number: 2419920

Investment Adviser Representative

Tactivest, LLC d/b/a Stout Wealth Management

1 Sansome St, 35<sup>th</sup> Floor  
San Francisco, CA 94104

9595 Wilshire Blvd, Suite 900  
Beverly Hills, CA 90212  
(310) 987-6900

[andrew.stout@tactivest.com](mailto:andrew.stout@tactivest.com)

UPDATED: 02/08/2024

## Item 2: Educational Background and Business Experience

**Name:** Andrew James Stout      **Born:** 1967

### Educational Background and Professional Designations:

#### Education:

Andrew James Stout has not received any higher education degrees after high school.

#### Business Background:

09/2019 - Present	Investment Advisor Representative Tactivest
10/2012 - 08/2019	Senior Portfolio Manager Raymond James
10/2009 - 09/2014	Senior Vice President Merrill Lynch
05/2004 - 11/2009	Vice President UBS

## 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

1. University of the Pacific Arthur A Dugoni School of Dentistry - Member Board of Directors. (Charity and Unpaid)
2. Leonard & Ilona Ling Family Foundation - President and Member Board of Directors. (Charity and Unpaid)

3. William & Sonia Pindler Family Foundation - Member Board of Directors. (Charity and Unpaid)
4. Independent Licensed Insurance Agent - Life & Health CA Insurance Lic# OC21959.
5. Cam Day LLC is a Holding Company, and Acacia Private Wealth LLC is a Holding Company. Neither of these companies provide advisory services nor create a conflict of interest.

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

Andrew James Stout does not receive any economic benefit from any person, company, or organization, other than Tactivest, LLC d/b/a Stout Wealth Management in exchange for providing clients advisory services through Tactivest, LLC d/b/a Stout Wealth Management.

### **Item 6: Supervision**

As a representative of Tactivest, LLC d/b/a Stout Wealth Management, Andrew James Stout is supervised by Everest Wong, the firm's Chief Compliance Officer. Everest Wong is responsible for ensuring that Andrew James Stout 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 Everest Wong is (415) 752-7311.