

*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](http://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  
1 Sansome St, 35<sup>th</sup> Floor  
San Francisco, CA 94104  
(415) 752-7311  
[everest@tactivest.com](mailto:everest@tactivest.com)

UPDATED 02/06/2024

## 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<br>Tactivest, LLC              |
| 01/2015 - 04/2021 | Registered Representative<br>Aurora Private Wealth (APW) |
| 11/2005 - 01/2015 | Branch Manager<br>LPL Financial                          |
| 02/2003 - 11/2005 | Financial Advisor<br>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. Tactivest, 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 Tactivest, LLC in their capacity as a licensed insurance agent.

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

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 the Chief Compliance Officer of Tactinvest, LLC, Everest Wong supervises all duties and activities of the firm. Everest Wong's contact information is on the cover page of this disclosure document. Everest Wong adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.