



Brochure Supplement for

**Laura Bruce**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
Anchorage, AK 99501

(907) 272-7575

[www.apcm.net](http://www.apcm.net)

January 23, 2023

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Additional information about Laura Bruce is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

Laura Bruce

Director

Born: 1969

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

University of Wisconsin-Whitewater; BBA  
Certified Financial Planner™, American College  
University for International Studies, Madrid, Spain  
Chartered Financial Consultant, American College  
Series 65 License

### Business Experience:

2014-Present	Alaska Wealth Advisors
2007-2014	Alaska Permanent Capital Management
2002-2007	First National Bank of Anchorage, Trust Officer/Portfolio Dev.
1999-2003	Wachovia Securities, Financial Advisor/Institutional Relationship Manager
1994-1999	Bank of America, VP Private Bank Portfolio Manager

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Bruce. We have no such event to report to you.

## Item 4 – Outside Business Activities

Ms. Bruce is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Bruce is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 – Additional Compensation

Ms. Bruce does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### **Item 6 – Supervision**

Ms. Bruce serves as a Director at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Cathie Straub**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
Anchorage, AK 99501

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Additional information about Cathie Straub is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Cathie Straub**

**Director**

**Born: 1963**

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Miami University, Oxford, Ohio, Cum Laude BS Business (Accounting & Finance)  
Certified Financial Planner™  
Certified Public Accountant  
Series 65 License

### Business Experience:

2014-Present	Alaska Wealth Advisors
2009-2014	Alaska Permanent Capital Management
1991-2009	Financial Resources, Inc.
1985-1991	Ernst & Young, CPA

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Straub. We have no such event to report to you.

## Item 4 – Outside Business Activities

Ms. Straub is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Straub is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 – Additional Compensation

Ms. Straub does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

### Item 6 – Supervision

Ms. Straub serves as a Director at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Marietta Hall**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
Anchorage, AK 99501

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Additional information about Marietta Hall is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Marietta Hall**

**Senior Financial Advisor**

**Born: 1969**

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Washington State University, BA Finance

University of Alaska, Anchorage

Certified Financial Planner™ College for Financial Planning

Certified Public Accountant

Series 65 License

### Business Experience:

2016-Present	Alaska Wealth Advisors
2007-2016	Lincoln Financial Advisors, Advisor
2004-2007	KMS Financial, Advisor
1992-2007	Lincoln National Life, Advisor
1992-2004	Benefit Securities, Inc., Advisor

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Hall. We have no such event to report to you.

## Item 4 – Outside Business Activities

Ms. Hall is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Hall is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 – Additional Compensation



Ms. Hall does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### **Item 6 – Supervision**

Ms. Hall serves as a Senior Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Meghan Carson**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
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Additional information about Meghan Carson is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

Meghan Carson  
Financial Advisor

Born: 1991

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

University of Alaska Anchorage, BBA Accounting  
University of Alaska Anchorage, BA Economics  
Certified Financial Planner™  
Certified Public Accountant  
Series 65 License

### Business Experience:

2019-Present	Alaska Wealth Advisors
2018-2019	Thomas, Head & Greisen, PC, Senior Staff Accountant
2017-2018	Thomas, Head & Greisen, Staff Accountant
2016	Alaska Permanent Capital Management, Intern
2015-2016	Alaska Department of Revenue College Intern IV

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Carson. We have no such event to report to you.

## Item 4 – Outside Business Activities

Ms. Carson is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Carson is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 – Additional Compensation

Ms. Carson does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### **Item 6 – Supervision**

Ms. Carson serves as a Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Connor Michael**

of

**Alaska Wealth Advisors**

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Additional information about Connor Michael is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

Connor Michael  
Financial Advisor

Born: 1993

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Western State Colorado University, BBA  
Certified Financial Planner™  
Series 65 License

### Business Experience:

2018-Present	Alaska Wealth Advisors
2017-Present	Alyeska Ski Club Freeskiing Team, Program Director/Head Coach
2016-2018	Nanig Global Logistics, Technical Specialist
2015	Alaska Mental Health Trust Authority, Trust Land Office Intern
2012-2014	Boslough Construction, Summers

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Mr. Michael. We have no such event to report to you.

## Item 4 – Outside Business Activities

Mr. Michael is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Mr. Michael is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 – Additional Compensation

Mr. Michael does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

### Item 6 – Supervision

Mr. Michael serves as a Financial Advisor of Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

Nic Cohen

of

**Alaska Wealth Advisors**

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Additional information about Nic Cohen is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

Nic Cohen

Associate Financial Advisor

Born: 1990

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Northern Arizona University, BSBA Finance  
Series 66 License

### Business Experience:

2019-Present	Alaska Wealth Advisors
2017-2019	Alaska USA Financial Planning & Investment Services (Series 66 with CUNA Brokerage), Financial Advisor Assistant
2016-2017	Denali Federal Credit Union Investment Services, (Series 66 with CUNA Brokerage), Registered Financial Assistant
2016	Waddell & Reed, Financial Advisor
2015	AXA Advisors, Financial Advisor

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Mr. Cohen. We have no such event to report to you.

## Item 4 – Outside Business Activities

Mr. Cohen is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Mr. Cohen is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 – Additional Compensation

Mr. Cohen does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### **Item 6 – Supervision**

Mr. Cohen serves as a Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Tuan Graziano**

of

**Alaska Wealth Advisors**

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Suite 601  
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Additional information about Tuan Graziano is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Tuan Graziano**

**Associate Financial Advisor**

**Born: 1997**

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Series 66 License  
Series 7 License

### Business Experience:

2022-Present	Alaska Wealth Advisors
2018-2022	Merrill Lynch, Pierce, Fenner & Smith Incorporated, Client Associate
2017-2018	Sunshine Custom Promotions, Logistics & Customer Service Rep
2016-2017	Aurora Fine Art Gallery, Sales Representative
2016	Denali Montessori Elementary School, Community Schools Monitor

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Mr. Graziano. We have no such event to report to you.

## Item 4 – Outside Business Activities

Mr. Graziano is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Mr. Graziano is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 – Additional Compensation

Mr. Graziano does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### Item 6 – Supervision

Mr. Graziano serves as a Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Leah Levingston**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
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Additional information about Leah Levingston is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Leah Levingston**

**Associate Financial Advisor**

**Born: 1992**

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## **Item 2 – Educational Background and Business Experience**

### Education & Licenses:

University of Alaska Fairbanks, MBA  
Western Washington University, BA Economics  
Series 65 License

### Business Experience:

2020-Present	Alaska Wealth Advisors
2015-2020	All Alaska Tours, Product Manager

## **Item 3 – Disciplinary Information**

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Levingston. We have no such event to report to you.

## **Item 4 – Outside Business Activities**

Ms. Levingston is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Levingston is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## **Item 5 – Additional Compensation**

Ms. Levingston does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

## **Item 6 – Supervision**

Ms. Levingston serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Sadie Bjornsen Maubet**

of

**Alaska Wealth Advisors**

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Suite 601  
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Additional information about Sadie Bjornsen Maubet is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

Sadie Bjornsen Maubet  
Associate Financial Advisor

Born: 1989

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Alaska Pacific University, BA Accounting, BA Administration and Management

### Business Experience:

2021-Present	Alaska Wealth Advisors
2020	Swalling & Associates PC, Accountant
2016-2021	Bjornsen Bookkeeping, Owner

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Maubet. We have no such event to report to you.

## Item 4 – Outside Business Activities

Ms. Maubet is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Maubet is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 – Additional Compensation

Ms. Maubet does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

## Item 6 – Supervision

Ms. Maubet serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Stan Moiseev**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
Anchorage, AK 99501

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Additional information about Stan Moiseev is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Stan Moiseev**

**Associate Financial Advisor**

**Born: 1989**

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

State University of Management, BA/MPA  
Alaska Pacific University, MBA  
Series 65 License

### Business Experience:

2022-Present	Alaska Wealth Advisors
2021-2022	Wiki-Licious LLC, Project Manager
2019-2021	Alaska Pacific University, Assistant Professor, Graduate Representative, Resident Assistant
2016-2019	Russian Federal Environmental Protection Agency, Deputy Regional Headquarter Administrator
2015-2016	Citi, Intern
2012-2015	Sereputation Business Media Marketing, LLC, Deputy General Manager

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Mr. Moiseev. We have no such event to report to you.

## Item 4 – Outside Business Activities

Mr. Moiseev is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Mr. Moiseev is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 – Additional Compensation

Mr. Moiseev does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### **Item 6 – Supervision**

Mr. Moiseev serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Kelsey Rising**

of

**Alaska Wealth Advisors**

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Additional information about Kelsey Rising is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Kelsey Rising**

**Associate Financial Advisor**

**Born: 1988**

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## **Item 2 – Educational Background and Business Experience**

### Education & Licenses:

University of Nevada, Reno, BS Business  
Series 65 License

### Business Experience:

2021-Present	Alaska Wealth Advisors
2010-2020	BP Exploration Alaska, Supply Chain Management

## **Item 3 – Disciplinary Information**

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Rising. We have no such event to report to you.

## **Item 4 – Outside Business Activities**

Ms. Rising is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Rising is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## **Item 5 – Additional Compensation**

Ms. Rising does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

## **Item 6 – Supervision**

Ms. Rising serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Katelynn Toth**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
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Additional information about Katelynn Toth is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

**Katelynn Toth**

**Associate Financial Advisor**

**Born: 2000**

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## **Item 2 – Educational Background and Business Experience**

### Education & Licenses:

Western Washington University, BA Financial Economics

### Business Experience:

2021-Present	Alaska Wealth Advisors
2020-Present	Starbucks, Shift Supervisor
2018	Mt. River Counseling, Contractor
2018	Senator Murkowski – US Senate Intern

## **Item 3 – Disciplinary Information**

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Toth. We have no such event to report to you.

## **Item 4 – Outside Business Activities**

Ms. Toth is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ms. Toth is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## **Item 5 – Additional Compensation**

Ms. Toth does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

## **Item 6 – Supervision**



Ms. Toth serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.



Brochure Supplement for

**Dave Valdez**

of

**Alaska Wealth Advisors**

900 West 5<sup>th</sup> Avenue  
Suite 601  
Anchorage, AK 99501

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Additional information about Dave Valdez is available on the SEC's website at [www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

Dave Valdez

Director

Born: 1981

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## Item 2 – Educational Background and Business Experience

### Education & Licenses:

Albers School of Business and Economics at Seattle University, BA  
University of Alaska Anchorage, MBA  
Chartered Financial Consultant  
Series 65 License

### Business Experience:

2023-Present	Alaska Wealth Advisors
2021-2022	Arbor Capital Management, Director
2021	TD Ameritrade, Relationship Manager
2020-2021	Charles Schwab, Relationship Manager
2018-2020	TD Ameritrade, Senior Manager
2011-2018	Charles Schwab, Senior Manager

## Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Mr. Valdez. We have no such event to report to you.

## Item 4 – Outside Business Activities

Mr. Valdez is not engaged in any other investment-related activities and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Mr. Valdez is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 – Additional Compensation

Mr. Valdez does not receive any economic benefits for providing advisory services other than the compensation package we provide. No part of that compensation is based on incentives (such as bonuses based on the number or amount of sales, client referrals, or new accounts).

#### **Item 6 – Supervision**

Mr. Valdez serves as a Director at Alaska Wealth Advisors and is supervised by Mr. Evan Rose, the Chief Executive Officer and Chief Compliance Officer. Mr. Rose can be reached at (907) 272-7575.