



Brochure Supplement for

Laura Bruce

of

Alaska Wealth Advisors

3800 Centerpoint Drive
Suite 910
Anchorage, AK 99503

(907) 272-7575

www.akwealthadvisors.com

April 24, 2024

This brochure supplement provides information about Alaska Wealth Advisors employees that supplements Alaska Wealth Advisor's brochure. You should have received a copy of the brochure. Please contact Evan Rose, Alaska Wealth Advisors CEO/CCO, if you did not receive the brochure or if you have any questions about the content of this supplement. Additional information about Alaska Wealth Advisors employees with a Series 65 license is available on the SEC's website at www.adviserinfo.sec.gov.

Additional information about Laura Bruce is available on the SEC's website at www.AdviserInfo.sec.gov.

Laura Bruce

Director

Born: 1969

Item 2 – Educational Background and Business Experience

Education & Licenses:

University of Wisconsin-Whitewater; BBA
Certified Financial PlannerTM, 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
2003-2007	First National Bank of Anchorage, Trust Officer/Portfolio Dev.
2003-2007	Legacy Wealth Strategies, Contractor
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

Dave Valdez

of

Alaska Wealth Advisors

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Additional information about Dave Valdez is available on the SEC's website at www.AdviserInfo.sec.gov.

Dave Valdez

Director

Born: 1981

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

Chartered Life Underwriter (CLU®)

Accredited Investment Fiduciary (AIF®)

Certified Wealth Strategist (CWS®)

Business Experience:

2023-Present	Alaska Wealth Advisors, Director
2021-2022	Arbor Capital Management, Director
2020-2021	Charles Schwab, Institutional Relationship Manager
2018-2020	TD Ameritrade, Divisional 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 Ms. Laura Bruce. Ms. Bruce can be reached at (907) 272-7575.



Brochure Supplement for

Meghan Muñoz

of

Alaska Wealth Advisors

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Additional information about Meghan Muñoz is available on the SEC's website at www.AdviserInfo.sec.gov.

Meghan Muñoz

Senior Financial Advisor

Born: 1991

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. Muñoz. We have no such event to report to you.

Item 4 – Outside Business Activities

Ms. Muñoz 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. Muñoz 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. Muñoz 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. Muñoz serves as a Senior Financial Advisor at Alaska Wealth Advisors and is supervised by Ms. Laura Bruce. Ms. Bruce 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.

Connor Michael
Financial Advisor

Born: 1993

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
2023-Present	Alyeska Ski Club, Freeride Coach
2017-2023	Alyeska Ski Club, Freeride Head Coach
2017-2020	Alyeska Ski Club, Freeride Program Director/Head Coach
2016-2018	Naniq 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 Ms. Laura Bruce. Ms. Bruce 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.

Nic Cohen

Financial Advisor

Born: 1990

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 Financial Advisor of Alaska Wealth Advisors and is supervised by Ms. Laura Bruce. Ms. Bruce can be reached at (907) 272-7575.



Brochure Supplement for

Leah Livingston

of

Alaska Wealth Advisors

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Additional information about Leah Levingston is available on the SEC's website at www.AdviserInfo.sec.gov.

Leah Levingston
Financial Advisor

Born: 1992

Item 2 – Educational Background and Business Experience

Education & Licenses:

University of Alaska Fairbanks, MBA
Western Washington University, BA Economics
Series 65 License
Certified Financial Planner (CFP®)

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 a Financial Advisor at Alaska Wealth Advisors and is supervised by Ms. Meghan (Carson) Muñoz. Ms. (Carson) Muñoz can be reached at (907) 272-7575.



Brochure Supplement for

Johnathon Brandt

of

Alaska Wealth Advisors

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Additional information about Johnathon Brandt is available on the SEC's website at www.AdviserInfo.sec.gov.

Johnathon Brandt

Associate Financial Advisor

Born: 1995

Item 2 – Educational Background and Business Experience

Education & Licenses:

The University of Montana, BS (2020)

Series 65 License

Business Experience:

2024-Present Alaska Wealth Advisors

2022-2023 Peak Trust Company, Associate Director of Fiduciary Services

2020-2022 First Covenant Trust and Advisors, Trust Associate

Item 3 – Disciplinary Information

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

Item 4 – Outside Business Activities

Mr. Brandt 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. Brandt 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. Brandt 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. Brandt serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Ms. Meghan (Carson) Muñoz, a Financial Advisor. Ms. (Carson) Muñoz can be reached at (907) 272-7575.



Brochure Supplement for

Stanislav Moiseev

of

Alaska Wealth Advisors

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Additional information about Stan Moiseev is available on the SEC's website at www.AdviserInfo.sec.gov.

Stanislav Moiseev

Associate Financial Advisor

Born: 1989

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. Dave Valdez. Mr. Valdez can be reached at (907) 272-7575.



Brochure Supplement for

Derek Stone

of

Alaska Wealth Advisors

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Additional information about Derek Stone is available on the SEC's website at www.AdviserInfo.sec.gov.

Derek Stone
Associate Advisor

Born: 1999

Item 2 – Educational Background and Business Experience

Education & Licenses:

Pacific Lutheran University, BA (2018-2022)
Series 65 License

Business Experience:

2023-Present	Alaska Wealth Advisors
2022-2023	AK Good Wood, Shop Assistant
2022-2022	PLU TelALutes, Call Center
2020-2022	Lakewood Racquet Club/Tacoma Country Club, Tennis Instructor

Item 3 – Disciplinary Information

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

Item 4 – Outside Business Activities

Mr. Stone 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. Stone 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. Stone 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. Stone serves as an Associate Advisor at Alaska Wealth Advisors and is supervised by Ms. Meghan (Carson) Muñoz, a Financial Advisor. Ms. (Carson) Muñoz can be reached at (907) 272-7575.



Brochure Supplement for

Nicole Squires

of

Alaska Wealth Advisors

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Additional information about Nicole Squires is available on the SEC's website at www.AdviserInfo.sec.gov.

Nicole Squires

Associate Financial Advisor

Born: 1990

Item 2 – Educational Background and Business Experience

Education & Licenses:

Series 7 License

Series 63 License

Series 65 License

Penn State University, BA (2012)

Business Experience:

2023-Present

Alaska Wealth Advisors

2020-2023

Wells Fargo Bank, NA, Personal Banker

2020-2023

Wells Fargo Clearing Services, LLC, Registered Rep.

2016-2020

First Command Advisory Services, Inc., Investment Advisor Rep.

Item 3 – Disciplinary Information

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

Item 4 – Outside Business Activities

Ms. Squires 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. Squires 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. Squires 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. Squires serves as an Associate Financial Advisor at Alaska Wealth Advisors and is supervised by Ms. Laura Bruce. Ms. Bruce can be reached at (907) 272-7575.