

Ross M. Gerber

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 23, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Ross M. Gerber that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Ross Gerber (CRD # 502747) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Ross Matthew Gerber

CRD# 2502747

Year of Birth: 1971

Formal Education After High School:

- University of Pennsylvania, B.A.

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, President/Investment Adviser Representative, 05/2010 - Present
- Gerber Kawasaki Wealth & Investment Management, Chief Compliance Officer, 05/2010 - 06/2021
- LPL Financial, LLC, Registered Representative, 10/2012 - 01/2018
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Principal, 06/1994 - 10/2012
- Independent Capital Management, Inc., Chief Operating Officer/Chief Investment Officer, 01/1995 - 05/2010

Item 3 Disciplinary Information

Mr. Gerber does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Ross Gerber is a Principal of Gerber Kawasaki, Inc., the Parent Company to the registered investment adviser and the insurance company. Mr. Gerber's duties as a Principal of Gerber Kawasaki, Inc. do not create a conflict of interest to his provision of advisory services through Gerber Kawasaki Wealth & Investment Management. Mr. Gerber devotes approximately 30% of his time in this capacity (0% of time occurs during trading hours).

Mr. Gerber has an ownership interest in Gerber Kawasaki Insurance Service, a licensed insurance agency. Mr. Gerber is also separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Gerber for insurance related activities. This presents a conflict of interest because Mr. Gerber may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Mr. Gerber is a non-controlling minority owner and member of the Board of Directors of House Hack LLC, a privately held real estate company. Mr. Gerber's role on the Board of Directors is to provide strategic financial advice as well as evaluate real estate opportunities for the company. House Hack, LLC is also a client of Gerber Kawasaki and maintains an investment account at the firm for its excess capital. Mr. Gerber spends less than 5% of his time on this activity. Notwithstanding his role on the Board and the fact that House Hack LLC is a client of Gerber Kawasaki, Mr. Gerber is a fiduciary and is obligated to act in the best interests of all his clients. A conflict of interest exists because House Hack LLC has the ability to trade ahead of you and potentially receive more favorable prices than you will receive. To mitigate this conflict of interest, it is our policy that no client of our firm shall have priority over another client when purchasing or selling the same securities.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Gerber's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Danilo Kawasaki, CFP[®], CPWA[®]

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

**2437 Main Street
Santa Monica, California 90405**

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Danilo Kawasaki that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Danilo Kawasaki (CRD #4494546) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Danilo Kawasaki, CFP® , CPWA®
CRD# 4494546

Year of Birth: 1978

Formal Education After High School:

- University of Redlands, B.S., Business Administration

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Chief Compliance Officer, 6/2021 - Present
- Gerber Kawasaki Wealth & Investment Management, Vice-President/ Investment Adviser Representative, 4/2010 - Present
- LPL Financial, LLC, Registered Principal, 10/2012 - 7/2021
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Principal, 3/2002 - 10/2012
- Independent Capital Management, Inc., Division Manager, 3/2002 - 5/2010

Certifications: **CFP® , CPWA®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

CERTIFIED PRIVATE WEALTH ADVISOR (CPWA®)

Certified Private Wealth Advisor (CPWA®) is a designation for wealth managers working with high-net worth clients. The certification is obtained from The University of Chicago Booth School of Business, or online program through Yale School of Management with a six month pre study educational component. A qualified CPWA has a Bachelor's degree or holds a CIMA, CIMC, CFA, CFP, ChFC or CPA license, has a satisfactory record of ethical conduct, as determined by IMCA's Admissions Committee and five years of professional client-centered experience in financial services or a related industry. The individual is required to take 40 hours every two years of continuing education. CPWA® certified professionals understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.

Item 3 Disciplinary Information

Mr. Kawasaki does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Kawasaki has an ownership interest in Gerber Kawasaki Insurance Services, a licensed insurance agency. Mr. Kawasaki is also separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki, Inc and/or Mr. Kawasaki for insurance related activities. This presents a conflict of interest because Mr. Kawasaki may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Kawasaki's receipt of additional compensation as a result of his other business activities.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

As Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management, Mr. Kawasaki is not supervised by other persons. Mr. Kawasaki can be reached at 310-399-6397.

Nicholas P. Anduze, CSRIC®

Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Nicholas P. Anduze that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas P. Anduze (CRD # 6517294) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Nicholas P. Anduze

CRD # 6517294

Year of Birth: 1982

Formal Education After High School:

- UCLA Los Angeles, BA History, Minors in Urban Planning and Public Policy, 2008

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 11/2019 - Present; Client Services Associate, 4/2018 – Present
- Sustainable Economic Enterprises of Los Angeles, LAUSD Project Consultant, 1/2012 - 4/2018
- Neilson Financial Services, Life Insurance Specialist, 5/2017 - 11/2017
- Ameriprise Financial Services, Inc., Financial Planning Specialist, 7/2015 - 1/2017

Certifications: **CSRIC®**

Chartered SRI Counselor™ (CSRIC®)

The Chartered SRI Counselor™ (CSRIC®) designation is a professional credential for financial advisors focused on sustainable, responsible, and impact investing (SRI). It provides training on how to incorporate environmental, social, and governance (ESG) factors into investment advice and portfolio construction.

To earn the CSRIC® designation, candidates must complete a course of study covering ESG investing, sustainable investment strategies, and related fiduciary considerations. Candidates must also pass a final exam. There are no formal prerequisites for enrollment.

Designees are required to complete continuing education and comply with ethical standards to maintain the designation.

The College for Financial Planning may revoke the designation if a designee fails to meet continuing education requirements or violates ethical standards.

This designation does not guarantee any specific level of skill or expertise.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Nicholas P. Anduze has no required disclosures under this item.

Item 4 Other Business Activities

Nicholas P. Anduze is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Anduze for insurance related activities. This presents a conflict of interest because Mr. Anduze may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Anduze's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Zachary V. Bainter, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Zachary V. Bainter that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Zachary V. Bainter (CRD # 5675357) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Zachary V. Bainter, CFP®
CRD# 5675357

Year of Birth: 1987

Formal Education After High School:

- UCLA, B.A. History and Political Science, 2009

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 6/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 12/2020
- SagePoint Financial, Inc., Registered Representative, 6/2009 - 10/2012
- Independent Capital Management, Inc., Financial Services Specialist, 6/2009 - 5/2010

Certifications: CFP®

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

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Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Mr. Bainter does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Bainter is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Bainter for insurance related activities. This presents a conflict of interest because Mr. Bainter may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Bainter's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

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Michael A. Baker, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

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Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Michael A. Baker that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Michael A. Baker (CRD # 6357064) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Michael A. Baker
CRD # 6357064

Year of Birth: 1992

Formal Education After High School:

- San Diego State University, BS Business Administration, Finance, 2014
- El Camino College, AS Business, 2012

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 1/2018 - Present
- LPL Financial, LLC, Registered Representative, 10/2017 - 11/2019
- Tecolote Research Inc., Analyst, 9/2016 - 1/2018
- Blue Tech Inc., IT Sales, 6/2015 - 12/2015

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

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Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Mr. Baker does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Baker is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Baker for insurance related activities. This presents a conflict of interest because Mr. Baker may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Baker's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Saleem Jimmy Bisharat

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

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Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Saleem Jimmy Bisharat that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Saleem Jimmy Bisharat (CRD # 7629566) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Saleem Jimmy Bisharat
CRD # 7629566

Year of Birth: 1999

Formal Education After High School:

- San Diego State University, BS Business Finance, 2021

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 9/2022 - Present
- Coastal Marine Services, Accounting, 3/2018 - 8/2022

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Bisharat has no required disclosures under this item.

Item 4 Other Business Activities

Saleem Jimmy Bisharat is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Bisharat for insurance related activities. This presents a conflict of interest because Mr. Bisharat may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Bisharat's receipt of additional compensation as a result of his other business activities.

Item 6 Supervision

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Sage Casaga, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Sage Casaga that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Sage Casaga (CRD # 7256352) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Sage Casaga, CFP®

CRD # 7256352

Year of Birth: 1996

Formal Education After High School:

- California Polytechnic State University, BS Business Administration, 3/2020

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 5/2020 - Present
- Glenn Burdette, Administrative Assistant Intern, 1/2020 - 4/2020
- Cal Poly, Event Staff, 9/2019 - 3/2020
- Casaga Electric Inc., Assistant, 2017 – 2020

CERTIFIED FINANCIAL PLANNER® (CFP®)

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Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a

CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Sage Casaga has no required disclosures under this item.

Item 4 Other Business Activities

Sage Casaga is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Casaga for insurance related activities. This presents a conflict of interest because Mr. Casaga may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Casaga's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Robert Castillo, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Robert Castillo that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management 's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Castillo (CRD # 5669083) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Robert Castillo, CFP®
CRD# 5669083

Year of Birth: 1986

Formal Education After High School:

- UCLA, Majored in Art History and French, 09/2004 - 12/2008

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 06/2010 - Present
- LPL Financial, LLC, Registered Representative, 05/2009 - 07/2021
- Independent Capital Management, Inc., Financial Services Specialist, 06/2009 - 06/2010
- DCM, Fundraising, 06/2009 - 07/2009
- Telefund, Fundraising, 05/2008 - 02/2009
- Armand Hammer Museum, 07/2007 - 02/2008

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Mr. Castillo does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Castillo is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Castillo for insurance related activities. This presents a conflict of interest because Mr. Castillo may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Castillo's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Kyle J. Clark, CFP®
Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street
Santa Monica, CA 90405

Telephone: 310-399-6397
Facsimile: 310-392-4018

April 7, 2026

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Kyle J. Clark that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Kyle J. Clark (CRD # 7180806) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Kyle J. Clark, CFP®

CRD # 7180806

Year of Birth: 1996

Formal Education After High School:

- Loyola Marymount University, BA Economics, BA Political Science, Minor Philosophy, 2018

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 9/2019 - Present
- Casetta Coffee, General Manager, 8/2019 - 9/2019
- Casetta Group, Project Manager, 8/2019 - 9/2019
- Montecito Venture Partners, Associate, 6/2018 - 7/2019

CERTIFIED FINANCIAL PLANNER® (CFP®)

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CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a

CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Kyle J. Clark has no required disclosures under this item.

Item 4 Other Business Activities

Kyle J. Clark is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Clark for insurance related activities. This presents a conflict of interest because Mr. Clark may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Clark's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Shawn DaCruz

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Shawn DaCruz that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Shawn DaCruz (CRD # 7377642) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Shawn DaCruz
CRD# 7377642

Year of Birth: 1990

Formal Education After High School:

- Western New England University, BA Biology, 2013
- University of Saint Joseph, Pharm.D Doctor of Pharmacy, 2016

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 6/2021 - Present
- Costco, Pharmacist, 9/2020 - 5/2021
- Louis and Clark, Pharmacist, 9/2019 - 5/2021
- CVS, Pharmacist, 10/2019 - 5/2020
- Walmart, Pharmacy Manager, 6/2017 - 8/2019
- Walmart, Pharmacist, 11/2016 - 6/2017

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Shawn DaCruz has no required disclosures under this item.

Item 4 Other Business Activities

Mr. DaCruz is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. DaCruz for insurance related activities. This presents a conflict of interest because Mr. DaCruz may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. DaCruz's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Hatem Dhiab, CFP[®], CIMA[®]
Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street
Santa Monica, CA 90405

Telephone: 310-399-6397
Facsimile: 310-392-4018

April 7, 2026

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Hatem Dhiab that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Hatem Dhiab (CRD # 4993585) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Hatem B. Dhiab, CFP[®], CIMA[®]

CRD# 4993585

Year of Birth: 1978

Formal Education After High School:

- California State University, B.A. International Division
- Santa Monica College, A.A.

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 5/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 4/2019
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Representative, 10/2005 - 10/2012
- Independent Capital Management, Inc., District Manager, 1/2005 - 5/2010

Certification: CFP[®]

CERTIFIED FINANCIAL PLANNER[®] (CFP[®])

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER[®] professional or a CFP[®] professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP[®] certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP[®] certification. You may find more information about CFP[®] certification at www.cfp.net.

CFP[®] professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP[®] professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP[®] Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP[®] Certification and Former CFP[®] Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP[®] professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Certification: CIMA®

CERTIFIED INVESTMENT MANAGEMENT ANALYST (CIMA®):

The Certified Investment Management Analyst® (CIMA®) certification is a prestigious designation for investment professionals. It focuses on practical portfolio construction and wealth management strategies. The CIMA® designation is issued by the Investments and Wealth Institute.

Initial Certification Requirements:

- **Experience:** Have a minimum of three years of verified work experience in the financial services sector.
- **Education:** Complete an executive education program through an approved provider (University of Chicago Booth School of Business, the Yale School of Management, or Portfolio Construction Forum), focusing on investment management principles and practices.
- **Exams:** Pass the CIMA® Certification exam, demonstrating a strong grasp of investment analysis, portfolio management, and ethical conduct in financial services.

Ongoing Requirements:

- **Continuing Education:** CIMA® recipients must complete 40 credit-hours of continuing education within a 2-year period.
- **Ethics:** CIMA® recipients are required to adhere to the Investments & Wealth Institute Code of Professional Responsibility.

Item 3 Disciplinary Information

Mr. Dhiab does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Dhiab is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Dhiab for insurance related activities.

This presents a conflict of interest because Mr. Dhiab may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Dhiab's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Benjamin T. Dunbar, CFP®, CPWA®

Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2347 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Benjamin T. Dunbar that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Benjamin T. Dunbar (CRD # 6407185) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Benjamin T. Dunbar, CFP[®], CPWA[®]
CRD# 6407185

Year of Birth: 1992

Formal Education After High School:

- California Polytechnic State University, BS Business, 2014

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 11/2014 - Present
- LPL Financial, LLC, Registered Representative, 11/2014 - 04/2019
- California Polytechnic, Student Assistant, 09/2012 - 06/2014
- Central Coast Surfboard, 11/2012 - 05/2014
- Cisco Systems, Inc., 06/2013 - 09/2013

Certifications: **CFP[®], CPWA[®]**

CERTIFIED FINANCIAL PLANNER[®] (CFP[®])

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Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP[®] Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP[®] Certification and Former CFP[®] Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP[®] professionals.

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Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

CERTIFIED PRIVATE WEALTH ADVISOR (CPWA®)

Certified Private Wealth Advisor (CPWA®) is a designation for wealth managers working with high-net worth clients. The certification is obtained from The University of Chicago Booth School of Business, or online program through Yale School of Management with a six month pre study educational component. A qualified CPWA has a Bachelor's degree or holds a CIMA, CIMC, CFA, CFP, ChFC or CPA license, has a satisfactory record of ethical conduct, as determined by IMCA's Admissions Committee and five years of professional client-centered experience in financial services or a related industry. The individual is required to take 40 hours every two years of continuing education. CPWA® certified professionals understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Benjamin Dunbar has no required disclosures under this item.

Item 4 Other Business Activities

Benjamin Dunbar is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Dunbar for insurance related activities. This presents a conflict of interest because Mr. Dunbar may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Dunbar's receipt of additional compensation as a result of his other business activities.

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Item 6 Supervision

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Steven Evensen, CFP®
Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street
Santa Monica, CA 90405

Telephone: 310-399-6397
Facsimile: 310-392-4018

April 7, 2026

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Steven Evensen that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Evensen (CRD # 6791965) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Steven Evensen, CFP®
CRD # 6791965

Year of Birth: 1994

Formal Education After High School:

- San Diego State University, BA Business Administration - Emphasis Finance, 2016

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Advisor Representative, 11/2021 - Present
- Northwestern Mutual, Associate Wealth Service Advisor, 1/2021 - 9/2021
- Charles Schwab, Client Relationship Specialist, 10/2018 - 1/2021
- Vanguard, Client Relationship Specialist, 5/2017 - 7/2018

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

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Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Mr. Evensen does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Evensen is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Evensen for insurance related activities. This presents a conflict of interest because Mr. Evensen may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Evensen's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Michael Gilman

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Michael Gilman that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Gilman (CRD # 6613584) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Michael Gilman
CRD # 6613584

Year of Birth: 1962

Formal Education After High School:

- UCLA, BA Political Science Law & Society, 1990
- USC, MBA Finance, 1993

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 1/2023 - Present
- Fidelity Brokerage Services LLC, Financial Consultant, 7/2018 - 8/2021
- NYLife Securities LLC, Registered Representative, 5/2016 - 7/2018
- New York Life Insurance Co, Agent, 3/2016 - 7/2018

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Michael Gilman has no required disclosures under this item.

Item 4 Other Business Activities

Michael Gilman is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as Investment Adviser Representative of Gerber Kawasaki Wealth & Investment Management. Moreover, Mr. Gilman does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Michael Gilman does not receive any additional compensation beyond that received as an Investment Adviser Representative of Gerber Kawasaki Wealth & Investment Management.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

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**Telephone: 310-399-6397
Facsimile: 310-392-4018**

April 6, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Ashley Guapo that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Ashley Guapo (CRD # 8031479) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Ashley Guapo
CRD# 8031479

Year of Birth: 2003

Formal Education After High School:

- Loyola Marymount University, Psychology, 2025

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 10/2025 – Present
- Loyola Marymount University, Student 08/2021 – 05/2025
- Cetera Advisor Networks, Associate and Investment Analyst 01/2025 – 10/2025
- Lucidity Management Company, Administrative Assistant 05/2021 – 09/2025
- Avasant, Finance, Operations, and Accounting Associate 01/2024 – 08/2024, 05/2023 – 08/2023
- Alo Yoga, Sales Associate 4/2022 – 8/2023
- Loyola Marymount University, Administrative Assistant 8/2021 – 1/2022

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ashley Guapo has no required disclosures under this item.

Item 4 Other Business Activities

Ashley Guapo is not actively engaged in any business or occupation other than the advisory services offered through Gerber Kawasaki Wealth & Investment Management.

Item 5 Additional Compensation

Ashley Guapo does not receive any other economic benefit or additional compensation from non-clients in connection with providing advisory services through Gerber Kawasaki Wealth & Investment Management.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Kaytlin M. Hall

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Kaytlin M. Hall that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management 's brochure or if you have any questions about the contents of this supplement.

Additional information about Kaytlin M. Hall (CRD # 5968719) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Kaytlin M. Hall
CRD# 5968719

Year of Birth: 1987

Formal Education After High School:

- Roger Williams University, BS Finance, 2009
- California Lutheran University, MBA Financial Planning, 2011

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 3/2012 - Present
- LPL Financial, LLC, Registered Representative, 3/2012 - 7/2021
- SagePoint Financial, Inc., Registered Representative, 3/2012 - 10/2012
- New England Securities, Registered Representative, 8/2011 - 2/2011

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Kaytlin Hall has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Hall is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Ms. Hall for insurance related activities. This presents a conflict of interest because Ms. Hall may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Ms. Hall's receipt of additional compensation as a result of her activities as a licensed insurance agent.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Ziad Hijazi, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

**2437 Main Street
Santa Monica, CA 90405**

**Telephone: 310-399-6397
Facsimile: 310-392-4018**

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Ziad Hijazi that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Ziad Hijazi (CRD # 7159376) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Ziad Hijazi

(CRD # 7159376)

Year of Birth: 1997

Formal Education After High School:

- California Polytechnic State University: San Luis Obispo, BS Business Administration Finance, 2019

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 7/2019 – Present

Certification: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a

commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Ziad Hijazi has no required disclosures under this item.

Item 4 Other Business Activities

Ziad Hijazi is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Hijazi for insurance related activities. This presents a conflict of interest because Mr. Hijazi may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Hijazi's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Matthew Iantosca, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Matthew Iantosca that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Iantosca (CDR# 5507568) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Matthew Iantosca, CFP®
CDR# 5507568

Year of Birth: 1984

Formal Education After High School:

- Loyola Marymount University, B.A. Business Administration, with emphasis in Computer Information Systems and Finance

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 5/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 7/2021
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Representative, 1/2009 - 10/2012
- Independent Capital Management, Inc., Financial Services Specialist, 11/2008 - 5/2010

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Mr. Iantosca does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Iantosca is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Iantosca for insurance related activities. This presents a conflict of interest because Mr. Iantosca may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Iantosca's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Jeff J. Kim, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Jeff J. Kim that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeff J. Kim (CRD # 5466411) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Jeff J. Kim, CFP®

Year of Birth: 1982

Formal Education After High School:

- University of California, Santa Barbara, BA Music, 2005
- The American College, CFP Certification, 2011

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Corporate Retirement Plan Specialist, 8/2023 - Present
- SagePoint Financial, Certified Financial Planner, 11/2017 - 8/2023
- B.B. Graham & Co., Certified Financial Planner, 2/2014 - 11/2017
- SII Investments, Certified Financial Planner, 5/2013 - 1/2014
- MML Investors Services, Financial Advisor, 5/2008 - 5/2013

Certifications: CFP®

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Jeff J. Kim has no required disclosures under this item.

Item 4 Other Business Activities

Jeff J. Kim is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Kim for insurance related activities. This presents a conflict of interest because Mr. Kim may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Kim's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

**2437 Main St.
Santa Monica, CA 90405**

**Telephone: 310-399-6397
Facsimile: 310-392-4018**

September 29, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Daniel Kutsch that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Kutsch (CRD # 815010) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Daniel Kutsch
CRD# 815010

Year of Birth: 2003

Formal Education After High School:

- University of North Carolina at Chapel Hill, Business Administration and Physics, 2025

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 07/2025 – Present
- University of North Carolina at Chapel Hill, Student 08/2021 – 05/2025
- Finley Golf Course, Outdoor Operations 08/2024 – 04/2025
- BLOX LLC., FP&A Intern 05/2024 – 08/2024
- Greybox Investments, Portfolio Management Intern 05/2021 – 07/2021
- Altamont School, Student 09/2020 – 05/2021

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Daniel Kutsch has no required disclosures under this item.

Item 4 Other Business Activities

Daniel Kutsch is not actively engaged in any business or occupation other than the advisory services offered through Gerber Kawasaki Wealth & Investment Management.

Item 5 Additional Compensation

Daniel Kutsch does not receive any other economic benefit or additional compensation from non-clients in connection with providing advisory services through Gerber Kawasaki Wealth & Investment Management.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Francine Lai, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Francine Lai that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Francine Lai (CRD # 5444668) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Francine Lai, CFP®
CRD# 5444668

Year of Birth: 1986

Formal Education After High School:

- University of San Diego - San Diego, CA
Bachelor of Science in International Business-Economics, 2008

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 6/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 7/2021
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Representative, 7/2009 - 10/2012
- Independent Capital Management, Inc., Financial Services Specialist, 9/2009 - 6/2010

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Ms. Lai does not have, nor has she ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Ms. Lai is also separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Ms. Lai for insurance related activities. This presents a conflict of interest because Ms. Lai may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Lai's receipt of additional compensation as a result of her activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Robert Lewis

Gerber Kawasaki, Inc.
d/b/a

Gerber Kawasaki Wealth & Investment Management

**2437 Main Street
Santa Monica, California 90404**

**Telephone: 310-399-6397
Facsimile: 310-392-4018**

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Robert Lewis that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Lewis (CRD # 7371630) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Robert Lewis

CRD# 7371630

Year of Birth: 1991

Formal Education After High School:

- UC Davis, BA Economics, 2013

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 4/2021 - Present
- Jet Propulsion Laboratory , Financial Analyst, 10/2016 - 6/2021
- Tecolote Research Inc., Cost Analyst, 10/2013 - 10/2016

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Robert Lewis has no required disclosures under this item

Item 4 Other Business Activities

Mr. Lewis is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Lewis for insurance related activities. This presents a conflict of interest because Mr. Lewis may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Lewis's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Nicholas N. Licouris, CFP® , ChSNC®

Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Nicholas N. Licouris that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas N. Licouris (CRD # 6305079) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Nicholas N. Licouris, CFP®
CRD# 6305079

Year of Birth: 1990

Formal Education After High School:

- California Polytechnic University - San Luis Obispo, BS Business Administration, 2012

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 4/2014 - Present
- LPL Financial, LLC, Registered Representative, 3/2014 - 7/2021
- Trimarc Financial Inc., Account Executive, 4/2013 - 2/2014
- Left Coast, Office Assistant, 5/2011 - 2/2012

Certifications: CFP®, ChSNC®

CERTIFIED FINANCIAL PLANNER™ (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Special Needs Consultant (ChSNC®)

The Chartered Special Needs Consultant (ChSNC®) designation is awarded by the The American College of Financial Services. This designation is designed for financial professionals who specialize in working with families with special needs dependents.

To earn the ChSNC® designation, candidates must complete a series of specialized courses covering topics such as special needs planning, government benefits (including Medicaid and Supplemental Security Income), special needs trusts, and estate planning considerations. Candidates must successfully pass proctored examinations for each course.

Designees are required to adhere to The American College's code of ethics and may be subject to continuing education requirements to maintain the designation.

Item 3 Disciplinary Information

Mr. Licouris does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Licouris is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Licouris for insurance related activities. This presents a conflict of interest because Mr. Licouris may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Licouris's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

**2437 Main St.
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**Telephone: 310-399-6397
Facsimile: 310-392-4018**

April 6, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Chase McCormick that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Chase McCormick (CRD # 8229398) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Chase McCormick
CRD# 8229398

Year of Birth: 2000

Formal Education After High School:

- Loyola Marymount University, Screenwriting, 2023

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 05/2023 – Present
- McCormick Basketball Camp, Coach, Chief Administrator, and Operation Manager 09/2012 – Present
- Loyola Marymount University, Student 08/2019 – 05/2023
- Loyola Marymount University, Student Worker 08/2019 – 05/2023
- Plastic Trees Pictures, Development and Production Intern 06/2021 – 02/203

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Chase McCormick has no required disclosures under this item.

Item 4 Other Business Activities

Chase McCormick is not actively engaged in any business or occupation other than the advisory services offered through Gerber Kawasaki Wealth & Investment Management.

Item 5 Additional Compensation

Chase McCormick does not receive any other economic benefit or additional compensation from non-clients in connection with providing advisory services through Gerber Kawasaki Wealth & Investment Management.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Daniel L. Mezzera

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Daniel L. Mezzera that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel L. Mezzera (CRD # 7364505) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Daniel L. Mezzera
CRD # 7364505

Year of Birth: 1985

Formal Education After High School:

- Loyola Marymount University, BA Business; BA Psychology, 2007
- Loyola Marymount University, MBA Business, 2009

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 4/2021 - Present
- Tecolote Research Inc, Analyst, 5/2007 - Present

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Daniel L. Mezzera has no required disclosures under this item.

Item 4 Other Business Activities

Daniel L. Mezzera is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Mezzera for insurance related activities. This presents a conflict of interest because Mr. Mezzera may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Mezzera's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Bryan A. Miranda, CLU®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Brian A. Miranda that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Brian A. Miranda (CRD # 5581968) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Bryan A. Miranda, CLU®
CRD# 5581968

Year of Birth: 1986

Formal Education After High School:

- UCLA, B.A. International Development, 2008

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 6/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 7/2021
- SagePoint Financial, Inc., Registered Representative, 8/2008 - 10/2012
- Independent Capital Management, Inc., Financial Services Specialist, 08/2008 - 5/2010

Certification: **CLU®**

THE CHARTERED LIFE UNDERWRITER (CLU®)

The Chartered Life Underwriter (CLU®) designation is issued by The American College of Financial Services (The American College). The CLU® is a professional credential that signifies a high level of proficiency in life insurance. To receive the CLU® designation, candidates must meet the following requirements:

- **Experience:** At least three years of experience in financial planning or a related field is required.
- **Education:** Candidates must successfully complete a series of five required courses offered by The American College of Financial Services. These courses cover a comprehensive range of topics, including life insurance products, estate planning strategies, risk management, and ethical conduct.
- **Exams:** After completing the coursework, candidates must pass a series of exams to prove their mastery of the material.
- **Continuing Education:** CLU® recipients must participate in ongoing education programs to maintain their designations.
- **Ethics:** CLU® recipients are required to agree to comply with The American College of Financial Services' code of ethics, ensuring they act in the best interests of their clients and provide fair and objective advice.

Item 3 Disciplinary Information

Mr. Miranda does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Miranda is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Miranda for insurance related activities. This presents a conflict of interest because Mr. Miranda may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Miranda's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Brogan Mooney

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

September 08, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Brogan Mooney that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Brogan Mooney (CRD # 7148142) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Brogan Mooney
CRD# 7148142

Year of Birth: 2000

Formal Education After High School:

- California Polytechnic State University - San Luis Obispo, Financial Management, 2018 - 2022

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 08/2025 – Present
- Fidelity Investments, Relationship Manager, 07/2024 – 08/2025
- Fidelity Investments, Financial Representative, 09/2023 – 07/2024
- 49 Wealth Management, Financial Professional, 06/2022 – 08/2023
- Bishop Peak Technology, Finance Department Specialist, 02/2021 – 06/2022
- Be Benjamin, Junior Magnate Intern, 10/2020 – 10/2021

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Mooney has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Mooney is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Mooney for insurance related activities. This presents a conflict of interest because Mr. Miranda may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Mooney's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Evan M. Rice
Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street
Santa Monica, CA 90405

Telephone: 310-399-6397
Facsimile: 310-392-4018

April 7, 2026

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Evan M. Rice that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Evan M. Rice (CRD # 8011941) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Evan M. Rice

CRD# 80111941

Year of Birth: 2002

Formal Education After High School:

- University of California, Los Angeles, Bachelor of Arts, Political Science, 2024

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Wealth Planning Associate, 10/2024 – Present
- EP Wealth Advisors, Financial Planning Analyst, 04/2023 – 11/2023
- University of California, Los Angeles, Full-Time Student, 09/2020 – 06/2024

Item 3 Disciplinary Information

Evan M. Rice does not have, nor has he ever had, any disciplinary disclosures.

Item 4 Other Business Activities

Evan M. Rice is not actively engaged in any business or occupation other than the advisory services offered through Gerber Kawasaki Wealth & Investment Management.

Item 5 Additional Compensation

Evan M. Rice does not receive any other economic benefit or additional compensation from non-clients in connection with providing advisory services through Gerber Kawasaki Wealth & Investment Management.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Benjamin A. Rosbach
Gerber Kawasaki, Inc.
d/b/a
Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Benjamin A. Rosbach that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Benjamin A. Rosbach (CRD # 7995613) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Benjamin A. Rosbach
CRD# 7995613

Year of Birth: 2001

Formal Education After High School:

- California Polytechnic State University, Bachelor of Science, Business Administration, 2024

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Wealth Planning Associate, 09/2024 – Present
- Gerber Kawasaki Wealth & Investment Management, Intern, 07/2024 – 09/2024
- California Polytechnic State University, Full-Time Student, 08/2020 – 06/2024

Item 3 Disciplinary Information

Benjamin A. Rosbach does not have, nor has he ever had, any disciplinary disclosures.

Item 4 Other Business Activities

Benjamin A. Rosbach is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Rosbach for insurance related activities. This presents a conflict of interest because Mr. Rosbach may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Rosbach's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Mia E. Samson

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Mia E. Samson that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Mia E. Samson (CRD # 7222246) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Mia E. Samson

CRD# 7222246

Year of Birth: 1998

Formal Education After High School:

- Loyola Marymount University, BS Economics, 2020

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 1/2022 - Present; Marketing & Social Media Manager, 2/2021 - Present
- Gerber Kawasaki Wealth & Investment Management, Executive Assistant, 11/2019 - 2/2021
- Loyola Marymount University, Special Projects Coordinator for LMU CARES, 5/2018 - 12/2019
- Loyola Marymount University, Student Worker Program Crew Member, 8/2016 - 12/2019

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Mia E. Samson has no required disclosures under this item.

Item 4 Other Business Activities

Mia E. Samson is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Samson for insurance related activities. This presents a conflict of interest because Ms. Samson may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the Other Business Activities section above for disclosures on Ms. Samson's receipt of additional compensation as a result of her other business activities.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Eyal Shmilovich, CPWA®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Eyal Shmilovich that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Eyal Shmilovich (CRD # 5699619) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Eyal Shmilovich, CPWA®
CRD# 5699619

Year of Birth: 1982

Formal Education After High School:

- University of Florida - Gainesville, FL
Education Specialist (Ed.S.) and Master's of Education (M.Ed.) in Marriage and Family Counseling, 2008
- University of California - Los Angeles, CA
Bachelor of Arts in Psychology and Classical Civilizations, 2005

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 6/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 11/2019
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Representative, 7/2009 - 10/2012
- Independent Capital Management, Inc., Financial Services Specialist, 7/2009 - 6/2010
- Leo Baeck Temple, Hebrew Teacher, 08/2008 - Present

Certifications: **CPWA®**

CERTIFIED PRIVATE WEALTH ADVISOR (CPWA®)

Certified Private Wealth Advisor (CPWA®) is a designation for wealth managers working with high-net worth clients. The certification is obtained from The University of Chicago Booth School of Business, or online program through Yale School of Management with a six month pre study educational component. A qualified CPWA has a Bachelor's degree or holds a CIMA, CIMC, CFA, CFP, ChFC or CPA license, has a satisfactory record of ethical conduct, as determined by IMCA's Admissions Committee and five years of professional client-centered experience in financial services or a related industry. The individual is required to take 40 hours every two years of continuing education. CPWA® certified professionals understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.

Item 3 Disciplinary Information

Mr. Shmilovich does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Shmilovich is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Shmilovich for insurance related activities. This presents a conflict of interest because Mr. Shmilovich may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Shmilovich's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Brett T. Sifling, CFP®, CEPA®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Brett T. Sifling that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Contact us at 310-399-6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Brett T. Sifling (CRD # 6897975) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Brett T. Sifling, CFP®
CRD # 6897975

Year of Birth: 1995

Formal Education After High School:

- Loyola Marymount University, BBA Finance, 2017

Business Background:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 12/2017 - Present
- Opus Connect, Jr. Business Development Representative, 10/2017 - 12/2017
- Belkin International, Financial Analyst, 6/2017 - 8/2017

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a

CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Certified Exit Planning Advisor (CEPA®)

The Certified Exit Planning Advisor designation is awarded by the Exit Planning Institute (“EPI”). The CEPA® designation is voluntary. The designation is designed for financial professionals who focus on exit planning and succession planning for business owners, including value growth, transition planning, and personal financial readiness.

To earn this designation, candidates must complete an education program administered or approved by the Exit Planning Institute. The program covers exit planning principles, including business value enhancement, transition planning, and personal financial readiness for business owners. Candidates must also pass a final examination designed to assess an individual’s understanding of exit planning concepts and their application. Designees agree to adhere to EPI’s standards of professional conduct and ethical guidelines as a condition of certification.

To maintain the designation, designees must complete ongoing continuing education requirements established by EPI to maintain the designation and remain in good standing.

Item 3 Disciplinary Information

Mr. Sifling does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Brett T. Sifling is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Sifling for insurance related activities. This presents a conflict of interest because Mr. Sifling may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. Sifling's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Item 6 Supervision

Danilo Kawasaki, Chief Compliance Officer of Gerber Kawasaki Wealth & Investment Management is responsible for supervising the activities of our firm. Our firm has developed Written Supervisory Policies and Procedures which we follow that address his supervisory responsibilities including periodically reviewing investment recommendations, trades and communications with clients. Mr. Kawasaki can be reached at 310-399-6397.

Elijah Souza, CFP®

Gerber Kawasaki, Inc.

d/b/a

Gerber Kawasaki Wealth & Investment Management

2437 Main Street

Santa Monica, CA 90405

Telephone: 310-399-6397

Facsimile: 310-392-4018

April 7, 2026

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Elijah Souza that supplements the Gerber Kawasaki Wealth & Investment Management brochure. You should have received a copy of that brochure. Please contact 310.399.6397 if you did not receive Gerber Kawasaki Wealth & Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Elijah Souza (CRD # 5553526) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Elijah Souza, CFP®
CRD# 5553526

Year of Birth: 1986

Formal Education After High School:

- Loyola Marymount University, B.B.A., with double emphasis in Management and Marketing, 2008

Business Background Preceding Five Years:

- Gerber Kawasaki Wealth & Investment Management, Investment Adviser Representative, 9/2010 - Present
- LPL Financial, LLC, Registered Representative, 10/2012 - 7/2021
- SagePoint Financial, Inc., f/k/a AIG Financial Advisors, Registered Representative, 9/2010 - 10/2012
- Kurtzman Carson Consultants, Project Specialist, 6/2009 - 09/2010
- Ameriprise Financial Services, Inc., Registered Representative 7/2008 - 1/2009

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER® (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Mr. Souza does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Mr. Souza is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Gerber Kawasaki Wealth & Investment Management and/or Mr. Souza for insurance related activities. This presents a conflict of interest because Mr. Souza may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Souza's receipt of additional compensation as a result of his activities as a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Gerber Kawasaki Wealth & Investment Management's firm brochure for additional disclosures on this topic.

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