



Form ADV Part 2B Brochure Supplement

December 12, 2024

Individuals covered by this supplement include:

Thomas C. Stefaniak
Brad M. Meyer
Bryton N. Kessel

Office Location:

2696 S. Colorado Blvd, Suite 430
Denver, CO 80222
248-540-3829

Corporate Office:

24 Corporate Plaza Drive, Suite 150
Newport Beach, CA 92660
949-718-1600

This brochure supplement provides information about the above listed individuals that supplements the Beacon Pointe Advisors, LLC brochure. You should have already received a copy of that brochure. Please contact us at 949-718-1600 if you did not receive our brochure or if you have any questions about the contents of this supplement.

Additional information about the above listed individuals is also available on the SEC's website at www.adviserinfo.sec.gov

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THOMAS C. STEFANIAK, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Thomas C. Stefaniak, CFP®, Partner, Managing Director, b. 1961

Education:

BBA, Real Estate and Finance, University of Wisconsin-Milwaukee

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2023-Present

Licensed Insurance Agent, Beacon Pointe Insurance Services, LLC, 2023-Present

Wealth Advisor, Pinnacle Wealth Management, Inc., 1998-Present

Financial Advisor, LPL Financial, LLC, 1998-2019

Professional Designations

Thomas Stefaniak holds the following professional designation:

Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™ and CFP® (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP® Board”). The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. The CFP® is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. CFP® certificate holders are bound by CFP® Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

To earn the credential, each CFP® candidate must have a bachelor’s degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience. In addition, candidates must take the CFP® Certification examination and complete a CFP® -board registered program or hold an accepted designation, degree or license. Every two years, CFP® certificate holders must complete a minimum of 30 hours of continuing education. More information regarding the CFP® is available at <http://www.cfp.net/default.asp>.

ITEM 3 – DISCIPLINARY INFORMATION

Thomas Stefaniak has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, Thomas Stefaniak is a licensed insurance agent for Beacon Pointe Insurance Services, LLC (“BPIS”). Beacon Pointe Advisors, LLC is affiliated with BPIS. BPIS is a licensed insurance agency. BPIS receives commissions on insurance products clients purchase, and Thomas Stefaniak is eligible to receive a portion of these commissions. Clients pay separate fees for

advisory services and insurance products or services. This practice gives Thomas Stefaniak an incentive to recommend insurance products based on the compensation received, rather than on the client's needs. Clients are not obligated to act on any insurance recommendations or place any transactions through Thomas Stefaniak or BPIS if they decide to follow Mr. Stefaniak's recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Thomas Stefaniak's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Thomas Stefaniak is eligible to receive is outlined above in *Item 4 – Other Business Activities*.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Thomas Stefaniak oversees the investment advice provided from Beacon Pointe Advisors' Denver, CO office. His advice is not monitored by any other individual. He is however bound by Beacon Pointe's Code of Ethics.

Shannon Eusey, Chief Executive Officer and Chief Compliance Officer is the supervisor of Thomas Stefaniak. She can be reached by calling 949-718-1600.

BRAD M. MEYER, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brad M. Meyer, CFP®, Wealth Advisor, b. 1996

Education:

BS, Business Administration, Creighton University

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present

Wealth Advisor, Pinnacle Wealth Management, LLC, 2019-2023

Financial Advisor, Edward Jones, 2018-2019

Internal Wholesaling Intern, Pacific Life, 2017-2018

Professional Designations

Brad Meyer holds the following professional designation:

Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™ and CFP® (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP® Board”). The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. The CFP® is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. CFP® certificate holders are bound by CFP® Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

To earn the credential, each CFP® candidate must have a bachelor’s degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience. In addition, candidates must take the CFP® Certification examination and complete a CFP® -board registered program or hold an accepted designation, degree or license. Every two years, CFP® certificate holders must complete a minimum of 30 hours of continuing education. More information regarding the CFP® is available at <http://www.cfp.net/default.asp>.

ITEM 3 - DISCIPLINARY INFORMATION

Brad Meyer has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Brad Meyer is not engaged in any investment-related business or occupation other than providing advisory services through Beacon Pointe Advisors, LLC.

ITEM 5 - ADDITIONAL COMPENSATION

In addition to his regular compensation from Beacon Pointe Advisors, LLC, Brad Meyer is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Thomas Stefaniak, Partner, Managing Director, is responsible for supervising Brad Meyer's activities. Thomas Stefaniak monitors the advice provided by Brad Meyer for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Thomas Stefaniak can be reached by calling 303-806-0988.

BRYTON N. KESSEL, AIF®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Bryton N. Kessel, AIF®, Wealth Advisor, b. 1996

Education:

AA, Business, Red Rocks Community College

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present

Associate Advisor, Beacon Pointe Advisors, LLC, 2023-2024

Wealth Planner, Pinnacle Wealth Management, INC, 2020-2023

High Net Worth Service Associate, Fidelity Brokerage Services LLC, 2020

Professional Designations

Bryton Kessel holds the following professional designation:

Accredited Investment Fiduciary (“AIF”)

The AIF® designation is issued by the Center for Fiduciary Studies. To earn the designation, each AIF® candidate must complete either a web-based or capstone program, pass a final certification exam, and complete a minimum of 6 hours of continuing education per year. AIF® designees must also sign and agree to abide by a code of ethics. More information regarding the AIF® is available at <https://www.fi360.com/>.

ITEM 3 – DISCIPLINARY INFORMATION

Bryton Kessel has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Bryton Kessel is not engaged in any investment-related business or occupation other than providing advisory services through Beacon Pointe Advisors, LLC.

ITEM 5 - ADDITIONAL COMPENSATION

In addition to his regular compensation from Beacon Pointe Advisors, LLC, Bryton Kessel is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Thomas Stefaniak, Partner, Managing Director, is responsible for supervising Bryton Kessel’s activities. Thomas Stefaniak monitors the advice provided by Bryton Kessel for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Thomas Stefaniak can be reached by calling 303-806-0988.