



## Form ADV Part 2B Brochure Supplement

JULY 2025

### Individuals covered by this supplement include:

Jeanette S. Ng

Sally W. Ng

[www.beaconpointe.com](http://www.beaconpointe.com)

#### Office Location:

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Pleasant Hill, CA 94523  
925-937-6381

#### 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](http://www.adviserinfo.sec.gov)

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# JEANETTE S. NG, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Jeanette S. Ng, CFP®**, Partner, Managing Director, b. 1985

### *Education:*

MS, Financial Planning, Golden Gate University

BA, Business Economics, University of California, Santa Barbara

### *Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2025-Present

Agent, Beacon Pointe Insurance Services, LLC, 2025-Present

Investment Advisor Representative, WCG Wealth Advisors, LLC, 2016-2025

Financial Advisor, LPL Financial, LLC, 2013-2025

## Professional Designations

Jeanette Ng holds the following professional designation:

### *Certified Financial Planner (CFP®)*

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 the 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 about the CFP® is available at <http://www.cfp.net/default.asp>.

## ITEM 3 - DISCIPLINARY INFORMATION

Jeanette Ng has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role at Beacon Pointe Advisors, LLC (“BPA”), Jeanette Ng is a licensed insurance agent for Beacon Pointe Insurance Services, LLC (“BPIS”), a California-licensed insurance agency, under common

ownership with BPA. BPIS receives commissions on insurance products clients purchase, and Jeanette Ng may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Jeanette Ng may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Jeanette Ng to recommend insurance products based on the compensation received, rather than focusing solely on the client's needs.

Clients are not obligated to act on any insurance recommendations or conduct transactions through Jeanette Ng or BPIS if they follow Ms. Ng's recommendations.

## **ITEM 5 - ADDITIONAL COMPENSATION**

Jeanette Ng is a partner of Beacon Pointe Advisors, LLC, and is compensated by the firm with a salary and variable compensation based on the clients' assets she manages. Jeanette Ng is an equity owner in the parent company of the firm. The additional compensation that Jeanette Ng 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, Jeanette Ng oversees the investment advice provided from Beacon Pointe Advisors' Pleasant Hill, CA office. Her advice is not monitored by any other individual. She is, however, bound by Beacon Pointe's Code of Ethics.

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

## **SALLY W. NG, CFP®**

### **ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Sally W. Ng, CFP®**, Partner, Managing Director, b. 1954

*Education:*

BA, Accounting, California State University San Francisco

MBA, Finance, University of California, Berkeley

*Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, 2025-Present

Agent, Beacon Pointe Insurance Services, 2025-Present

Investment Advisor Representative, Wealth Consulting Group Wealth Advisors, LLC, 2015-2025

Registered Representative, LPL Financial, 2015-2025

### **Professional Designations**

Sally Ng holds the following professional designation:

*Certified Financial Planner (CFP®)*

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 the 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 about the CFP® is available at <http://www.cfp.net/default.asp>.

### **ITEM 3 – DISCIPLINARY INFORMATION**

Sally Ng has no disciplinary history to disclose.

### **ITEM 4 - OTHER BUSINESS ACTIVITIES**

In addition to her role at Beacon Pointe Advisors, LLC (“BPA”), Sally Ng is a licensed insurance agent for Beacon Pointe Insurance Services, LLC (“BPIS”), a California-licensed insurance agency, under common

ownership with BPA. BPIS receives commissions on insurance products clients purchase, and Sally Ng may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Sally Ng may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Sally Ng to recommend insurance products based on the compensation received, rather than focusing solely on the client's needs.

Clients are not obligated to act on any insurance recommendations or conduct transactions through Sally Ng or BPIS if they Ng's 's recommendations.

In addition to Sally Ng's role with Beacon Pointe Advisors, LLC, she owns and manages properties through 745 Balboa LLC and Laurel Apartments. This activity accounts for a de minimis amount of Sally Ng's time and income. This activity is unrelated to Beacon Pointe Advisors, LLC's advisory business. Beacon Pointe Advisors, LLC does not believe it presents a conflict of interest.

## **ITEM 5 - ADDITIONAL COMPENSATION**

Sally Ng is a partner of Beacon Pointe Advisors, LLC, and is compensated by the firm with a salary and variable compensation based on the clients' assets she manages. Sally Ng is an equity owner in the parent company of the firm. The additional compensation that Sally Ng 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, Sally Ng oversees the investment advice provided from Beacon Pointe Advisors' Pleasant Hill, CA office. Her advice is not monitored by any other individual. She is, however, bound by Beacon Pointe's Code of Ethics.

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