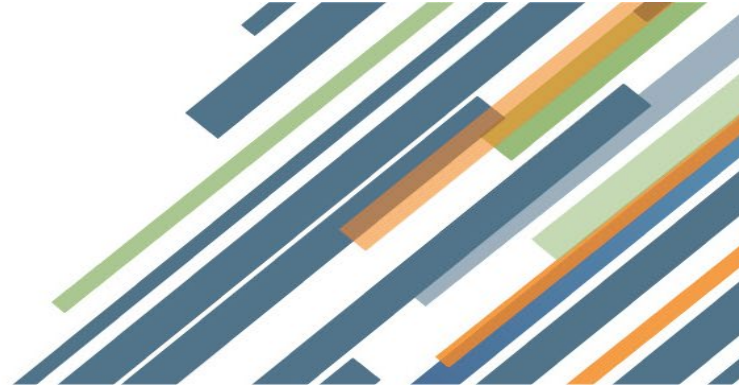




Form ADV Part 2B Brochure Supplement

February 7, 2024



Individuals covered by this supplement include:

Jill B. Steinberg
Katherine Pettee Hickey
Alisa B. Garnek
Michael A. Gonzalez
Rebecca A. Thompson

Located At:

2 Bala Plaza, Suite 806
Bala Cynwyd, PA 19004
610-664-6100

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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JILL B. STEINBERG, CDFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jill B. Steinberg, CDFA®, Partner, Managing Director, b. 1963

Education:

MBA, The Wharton School, University of Pennsylvania
BA, Economics, *cum laude*, Princeton University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present
Agent, Beacon Pointe Insurance Services, LLC, 2020-Present
Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2016-2020
Managing Director, Partner, Beacon Pointe Wealth Advisors, LLC, 2016-2020
President, Walden Capital Advisors, LLC, 2006-2016

Professional Designations

Jill Steinberg holds the following professional designation:

Certified Divorce Financial Analyst

The designation is issued by the Institute for Divorce Financial Analysts. The candidate is required to develop their theoretical and practical understanding and knowledge of the financial aspects of divorce by completing a comprehensive course of study. The candidate must also have two years' minimum experience in a financial or legal capacity. The candidate must complete a four-part exam and demonstrate the practical application of this knowledge. Continuing education of 30 hours every two years is required to maintain the designation. More information on the CDFA® can be found at: <https://www.institutedfa.com/v>.

ITEM 3 - DISCIPLINARY INFORMATION

Jill Steinberg has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role with Beacon Pointe Advisors, LLC, Jill Steinberg 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 client purchase, and Jill Steinberg is eligible to receive a portion of these commissions. Clients pay separate fees for advisory services and insurance products or services. This practice gives Jill Steinberg 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 Jill Steinberg or BPIS if they decide to follow Ms. Steinberg's recommendations.

Jill Steinberg also serves on the boards and investment committees for various local Philadelphia-area non-profit organizations. These activities account for a de minimis amount of Jill Steinberg's time, and she does not receive any economic benefit for her service.

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 - SUPERVISION

As Managing Director, Partner, at Beacon Pointe Advisors, LLC, Jill Steinberg oversees the investment advice provided from Beacon Pointe Advisors' Bala Cynwyd, Pennsylvania 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 Jill Steinberg. She can be reached by calling 949-718-1600.

KATHERINE PETTEE HICKEY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Katherine “Kate” Pettee Hickey, CFP®, Wealth Advisor, b. 1993

Education:

BBA, Finance and International Business, Business Law Minor, Villanova University
Attended London School of Economics and Political Science

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2021
Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2019-2020
Associate Wealth Advisor, Beacon Pointe Wealth Advisors, LLC, 2018-2020
Alternative Investment Analyst, J.P. Morgan Asset Management, 2017-2018

Professional Designations

Kate Pettee Hickey 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 the 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

Kate Pettee Hickey has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Kate Pettee Hickey's compensation comes from Beacon Pointe Advisors, LLC. She receives variable compensation that is based on the number of assets/clients she brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Jill Steinberg Partner, Managing Director, is responsible for supervising Kate Pettee Hickey's activities. Jill Steinberg monitors the advice provided by Kate Pettee Hickey for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Jill Steinberg can be reached by calling 610-664-6100.

ALISA B. GARNEK, CFP®, CDFA®, NSSA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alisa B. Garnek, CFP®, CDFA®, NSSA®, Associate Director, Financial Planning, b. 1978

Education:

MS, Taxation and Financial Planning, Widener University

Certificate, Taxation, Widener University

BS, Accounting, University of Delaware-Lerner College of Business and Economics

Business Background:

Associate Director of Financial Planning, Beacon Pointe Advisors, LLC, 2023-Present

Agent, Beacon Pointe Insurance Services, LLC, 2018-Present

Senior Financial Planner, Beacon Pointe Advisors, LLC, 2021-2023

Financial Planner, Beacon Pointe Advisors, LLC, 2020-2021

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2018-2020

Financial Planner, Beacon Pointe Wealth Advisors, LLC, 2018-2020

Professional Designations

Alisa Garnek holds the following professional designations:

Certified Financial Planner

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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>.

Certified Divorce Financial Analyst

The designation is issued by the Institute for Divorce Financial Analysts. The candidate is required to develop their theoretical and practical understanding and knowledge of the financial aspects of divorce by completing a comprehensive course of study. The candidate must also have two years’ minimum experience in a financial or legal capacity. The candidate must complete a four-part exam and

demonstrate the practical application of this knowledge. Continuing education of 30 hours every two years is required to maintain the designation. More information on the CDFA® can be found at: <https://www.institutedfa.com/>.

National Social Security Advisor

The National Social Security Association issues the designation. To earn the NSSA® designation, candidates must complete a self-study program and pass an online proctored qualifying examination. In addition, NSSA® certificate holders must complete eight hours of continuing education every two years. More information about the NSSA® is available at <https://nationalsocialsecurityassociation.com/>

ITEM 3 - DISCIPLINARY INFORMATION

Alisa Garnek has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role with Beacon Pointe Advisors, LLC, Alisa Garnek 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 client purchase, and Alisa Garnek is eligible to receive a portion of these commissions. Clients pay separate fees for advisory services and insurance products or services. This practice gives Alisa Garnek 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 Alisa Garnek or BPIS if they decide to follow Ms. Garnek’s recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

In addition to her regular compensation from Beacon Pointe Advisors, LLC, Alisa Garnek is eligible to receive compensation from the activities outlined above in **Item 4 – Other Business Activities**. Alisa Garnek is also eligible to receive compensation for referring new clients to Beacon Pointe Advisors, LLC.

ITEM 6 - SUPERVISION

Jill Steinberg, Partner, Managing Director, is responsible for supervising Alisa Garnek’s activities. Jill Steinberg monitors the advice provided by Alisa Garnek for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Jill Steinberg can be reached by calling 610-664-6100.

MICHAEL A. GONZALEZ, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael A. Gonzalez, CFP®, Wealth Advisor, b. 1993

Education:

BA, Economics, Pennsylvania State University

Business Background:

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

Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-2023

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2022

Account Manager, SEI Investments Company, 2017-2020

Staff Auditor, SEI Investments Company, 2016-2017

Professional Designations

Michael Gonzalez holds the following professional designation:

Certified Financial Planner

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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

Michael Gonzalez has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael Gonzalez 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, Michael Gonzalez is eligible to receive compensation for referring new clients to Beacon Pointe Advisors, LLC.

ITEM 6 - SUPERVISION

Jill Steinberg, Partner, Managing Director, is responsible for supervising Michael Gonzalez's activities. Jill Steinberg monitors the advice provided by Michael Gonzalez for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Jill Steinberg can be reached by calling 610-664-6100.

REBECCA A. THOMPSON, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Rebecca A. Thompson, CFP®, Wealth Advisor, b. 1971

Education:

BA, Leadership Development, Villanova University

Business Background:

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

Associate Financial Advisor, Wescott Financial Advisory Group, LLC, 2018-2023

Consultant, RKT Solutions, 2016-2018

Chief of Staff/Family Executive, Home Office of Dr. John Templeton, 2009-2016

Client Service Associate, Vantage Point Advisor, 2005-2009

Professional Designations

Rebecca Thompson holds the following professional designation:

Certified Financial Planner

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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

Rebecca Thompson has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Rebecca Thompson 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 her regular compensation from Beacon Pointe Advisors, LLC, Rebecca Thompson is eligible to receive variable compensation based on the number of assets/clients she brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Jill Steinberg, Partner, Managing Director, is responsible for supervising Rebecca Thompson's activities. Jill Steinberg monitors the advice provided by Rebecca Thompson for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Jill Steinberg can be reached by calling 610-664-6100.