



Form ADV Part 2B Brochure Supplement

July 2025

www.beaconpointe.com

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This brochure supplement provides information about the individuals listed in the Table of Contents who are supervised persons of Beacon Pointe Advisors, LLC. 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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CHRISTOPHER C. PHILLIPS, CEPA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christopher Phillips, CEPA®, Partner, Senior Wealth Advisor, b. 1989

Education:

BA, International Business, Whittier College

Business Background:

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

Senior Portfolio Manager, BNY Mellon, 2018-2024

Professional Designations

Christopher Phillips holds the following professional designation:

Certified Exit Planning Advisor, (CEPA®)

The Certified Exit Planning Advisor (CEPA®) designation is awarded by the Exit Planning Institute. The candidate must complete a five-day MBA style program that concludes with a proctored exam. Candidates must also meet all the following requirements:

- Five years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business-broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity.
- Undergraduate degree from a qualifying institution; if no qualifying degree candidate must submit additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies).
- Continuing Education: To retain the CEPA designation the designee must obtain 40 hours of Continuing Education ("CE") every three years and remain in good standing with Exit Planning Institute.

More information is available at [The Exit Planning Institute](https://www.exitplanninginstitute.com)

ITEM 3 - DISCIPLINARY INFORMATION

Christopher Phillips has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Christopher Phillips 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, Christopher Phillips is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Indya Yuill, Partner, Managing Director, is responsible for supervising Christopher Phillips' activities. Indya Yuill monitors the advice provided by Christopher Phillips' for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Indya Yuill can be reached by calling 310-488-7868.

DAVID M. SZABLA, CFP®, CRPC®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David M. Szabla, CFP®, CRPC®, Wealth Advisor, b. 1991

Education:

BA, History, Spanish, University of Washington

Business Background:

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

Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-2024

Financial Solutions Advisor, Merrill Lynch, Pierce, Fenner & Smith, Inc., 2016-2021

Financial Solutions Advisor, Bank of America, N.A, 2016-2021

Professional Designations

David Szabla holds the following professional designations:

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>.

Chartered Retirement Planning Counselor (CRPC®)

The Chartered Retirement Planning Counselor (CRPC®) designation is a retirement planning credential awarded by the College for Financial Planning® to individuals who meet its educational, examination and ethical requirements. To earn a CRPC® designation, candidates are required to have completed the CRPC® Designation Program, a self-taught educational program focused on various pre- and post- retirement needs of individuals. Recipients are further required to have successfully passed a multiple-choice examination addressing a range of retirement-related matters, such as estate planning and asset management. On an ongoing basis, CRPC® designees are also required to affirm their adherence to the

applicable Code of Ethics and complete at least 16 hours of continuing education every two years. More information about the CRPC is available at <https://www.cffp.edu/>.

ITEM 3 - DISCIPLINARY INFORMATION

David Szabla has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

David Szabla 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, David Szabla is eligible to receive compensation for referring new clients to Beacon Pointe Advisors, LLC.

ITEM 6 - SUPERVISION

Indya Yuill, Partner, Managing Director, is responsible for supervising David Szabla's activities. Indya Yuill monitors the advice provided by David Szabla for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Indya Yuill can be reached by calling 310-488-7868.

INDYA M. YUILL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Indya M. Yuill, Partner, Managing Director, b. 1986

Education:

BS, Business Administration, Finance, University of Southern California Marshall School of Business

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present

Partner, Managing Director, Beacon Pointe Wealth Advisors, LLC, 2019-2020

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2019-2020

ITEM 3 - DISCIPLINARY INFORMATION

Indya Yuill has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Indya Yuill's compensation comes from her regular salary and ownership of Beacon Pointe Advisors, LLC.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Indya Yuill oversees the investment advice provided from Beacon Pointe Advisors' Los Angeles, California 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 Indya Yuill. She can be reached by calling 949-718-1600.

JULIA M. CUMMINGS

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Julia M. Cummings, Senior Wealth Advisor, b. 1987

Education:

BA, Anthropology, Amherst College

Business Background:

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present

Senior Wealth Advisor, Beacon Pointe Wealth Advisors, LLC, 2018-2020

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

ITEM 3 - DISCIPLINARY INFORMATION

Julia Cummings has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Julia Cummings' 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

Indya Yuill, Partner, Managing Director, is responsible for supervising Julia Cummings' activities. Indya Yuill monitors the advice provided by Julia Cummings for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. She can be reached by calling 310-488-7868.

MATTHEW D. MACDONALD, CFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew D. MacDonald, CFA®, Senior Wealth Advisor, b. 1979

Education:

BCom, Commerce, Finance, University of British Columbia Sauder School of Business

Business Background:

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present

Registered Representative, Wells Fargo Clearing Services, LLC, 2018-2021

Wealth Advisor, Wells Fargo Bank, 2018-2021

Professional Designations

Matthew MacDonald holds the following professional designation:

Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst (“CFA®”) designation is sponsored by CFA Institute. To earn a CFA charter, candidates must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The three proctored course exams correspond to three 250-hour self-study levels. Completing the Program takes most candidates between two and five years. More information regarding the CFA is available at <https://www.cfainstitute.org/>

ITEM 3 - DISCIPLINARY INFORMATION

Matthew MacDonald has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Matthew MacDonald’s compensation comes from Beacon Pointe Advisors, LLC. He receives variable compensation that is based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Indya Yuill, Partner, Managing Director, is responsible for supervising Matthew MacDonald’s activities. Indya Yuill monitors the advice provided by Matthew MacDonald for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Indya Yuill can be reached by calling 310-488-7868.

TRENTON B. JOLLY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Trenton B. Jolly, CFP®, Wealth Advisor, b. 1996

Education:

BA, Economics, University of California, Los Angeles

Business Background:

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

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2019-Present

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2024

Associate Wealth Advisor, Beacon Pointe Wealth Advisors, LLC, 2019-2020

Professional Designations

Trenton Jolly 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

Trenton Jolly has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Trenton Jolly 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, Trenton Jolly is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Indya Yuill, Partner, Managing Director, is responsible for supervising Trenton Jolly's activities. Indya Yuill monitors the advice provided by Trenton Jolly for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. She can be reached by calling 310-488-7868.

WILLIAM BLACKARD

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William G. Blackard, Associate Wealth Advisor, b. 1997

Education:

MBA, University of Florida

BS, Business Administration, University of North Carolina

Business Background:

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

ITEM 3 - DISCIPLINARY INFORMATION

William Blackard has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

William Blackard 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, William Blackard is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 - SUPERVISION

Indya Yuill, Partner, Managing Director, is responsible for supervising William Blackard's activities. Indya Yuill monitors the advice provided by William Blackard for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. She can be reached by calling 310-488-7868.