



Form ADV Part 2B Brochure Supplement

November 21, 2024

Individuals covered by this supplement include:

James W. Ferrell
Eric M Faber
Paige L. Goll
Crystal S. Garner
Michael S. Himmel

Jennings L. Hurt IV
Sean T. Lamb
Christopher J. Budny
Edward R. Moor
William J. Ferrell

Located At:

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Winter Park, FL 32789
407-629-7008

819 Beachland Boulevard
Vero Beach, FL 32963
772-234-6455

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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JAMES W. FERRELL, CPA, CFP®, PFS, CIMC

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

James W. Ferrell, CPA®, CFP®, PFS CIMC, Partner, Managing Director, b. 1958

Education:

MBA, Finance, Florida State University

B.S., Accounting and Finance, University of Central Florida

Business Background:

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

Agent, Beacon Pointe Insurance Services, 2020-Present

Shareholder, President, and CEO, Ferrell Wealth Management, 1996-2020

Professional Designations

James Ferrell holds the following professional designations:

Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

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>.

Personal Financial Specialist (PFS)

The American Institute of Certified Public Accountants (AICPA) established the Personal Financial Specialist (PFS) credential for CPAs who specialize in various areas of financial planning. To earn the PFS credential, a candidate must hold an unrevoked CPA license issued by a state authority and have at least two years full-time teaching or business experience (or 3000 hours equivalent) in personal financial planning within the five years preceding the date of the CPA/PFS application, Also, candidates must complete a minimum of 75 hours of personal financial planning education within the five years preceding the date of the PFS application, and pass the final certification exam. Every three years, PFS certificate holders must complete a minimum of 60 hours (or its equivalent) of continuing professional education. More information regarding the PFS is available at <https://www.aicpa.org/>

Certified Investment Management Consultant (CIMC)

As of December 2003, new CIMC certifications are no longer granted. When the designation was issued, its content focused on investment consulting. Current CIMC designees can maintain the designation through Investments & Wealth Institute. CIMC designees are required to adhere to The Institute's *Code of Professional Responsibility, Rules and Guidelines for Use of the Marks*, and have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements. CIMC designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the designation.

ITEM 3 - DISCIPLINARY INFORMATION

James Ferrell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

Additionally, James Ferrell is a Member of Ferrell & Kelly, LLC, through which he has ownership in Ferrell & Kelly Certified Public Accountants (“Ferrell & Kelly”), a Certified Public Accountancy firm. This activity

accounts for a de minimis amount of James Ferrell's time and income. Ferrell & Kelly provide tax and accounting services to certain Beacon Pointe's clients in its Winter Park, Florida office. James Ferrell will, at times, recommend clients of Beacon Pointe utilize the services of Ferrell & Kelly for their accountancy needs. There are no fees paid for such referrals. As Member of Ferrell & Kelly, James Ferrell shares in the profits of Ferrell & Kelly. Therefore, even if James Ferrell does not directly perform services for Ferrell & Kelly's clients, he receives remuneration from those who do, some of which are clients of Beacon Pointe. The additional receipt of compensation creates a conflict of interest in that Mr. Ferrell has a financial incentive to recommend Ferrell & Kelly to Beacon Pointe clients as opposed to other accounting firms. To mitigate these conflicts, they are disclosed to the clients of Beacon Pointe at the time of their engagement with Beacon Pointe through the delivery of this Brochure Supplement. Further, clients are made aware that they are under no obligation to utilize Ferrell & Kelly for their accounting needs and are free to select any accountant/accountancy firm of their choosing.

James Ferrell serves as a director on the board of Winter Park National Bank. Mr. Ferrell also holds a Real Estate Broker license.

ITEM 5 - ADDITIONAL COMPENSATION

James Ferrell's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that James Ferrell 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, James Ferrell oversees the investment advice provided by Beacon Pointe Advisors, LLC's, Winter Park, Florida 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, Beacon Pointe Advisors, LLC, is the supervisor of James Ferrell. She can be reached at 949-718-1600.

PAIGE L. GOLL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Paige L. Goll, Principal, Senior Strategic Investment Advisor, b. 1981

Education:

MF, A.B. Freeman School of Business, Tulane University
B.A., Communications, Tulane University

Business Background:

Principal, Senior Strategic Investment Advisor, Beacon Pointe Advisors, LLC, 2020-Present
Director of Research and Senior Portfolio Manager, Ferrell Wealth Management, Inc., 2016-2020
PATH Certified Therapeutic Horseback Riding Instructor, 2014-2016

ITEM 3 - DISCIPLINARY INFORMATION

Paige Goll has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Paige Goll 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, Paige Goll is eligible to receive is eligible to receive compensation for referring new clients to Beacon Pointe Advisors, LLC.

ITEM 6 - SUPERVISION

James Ferrell, Partner, Managing Director, is responsible for supervising Paige Goll's activities. James Ferrell monitors the advice provided by Paige Goll for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

CRYSTAL S. GARNER

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Crystal S. Garner, Principal, Senior Wealth Advisor, b. 1963

Education:

B.A., Organizational Communication, Rollins College

Business Background:

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

Vice President Relationship Management, Senior Financial Advisor, Ferrell Wealth Management, Inc., 1996-2020

ITEM 3 - DISCIPLINARY INFORMATION

Crystal Garner has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Crystal Garner has no other business activities outside Beacon Pointe Advisors, LLC.

ITEM 5 - ADDITIONAL COMPENSATION

Crystal Garner'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

James Ferrell, Partner, Managing Director, is responsible for supervising Crystal Garner's activities. James Ferrell monitors the advice provided by Crystal Garner for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

JENNINGS L. HURT, IV

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jennings “J.L.” Hurt, IV, Principal, Senior Wealth Advisor, b. 1981

Education:

MBA, Crummer Graduate School of Business, Rollins College
B.S., Business Administration, Rhodes College

Business Background:

Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present
Senior Financial Advisor & Portfolio Manager, Ferrell Wealth Management, Inc., 2009-2020

ITEM 3 - DISCIPLINARY INFORMATION

J.L. Hurt, has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, J.L. Hurt serves as a board member with Drink B4 beverage company and Give Hope Foundation. These activities are not investment-related and account for a de minimis amount of Mr. Hurt’s time and income. Beacon Pointe, LLC, does not believe these activities present a conflict of interest.

ITEM 5 - ADDITIONAL COMPENSATION

J.L. Hurt’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

James Ferrell, Partner, Managing Director, is responsible for supervising J.L. Hurt’s activities. James Ferrell monitors the advice provided by J.L. Hurt for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. James Ferrell can be reached by calling 407-629-7008.

ERIC M. FABER

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Eric M. Faber, Principal, Regional Director, Senior Wealth Advisor, b. 1983

Education:

MBA, University of Central Florida
B.A., Political Science, Rollins College

Business Background:

Principal, Regional Director, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present
Financial Advisor, Ferrell Wealth Management, Inc., 2009-2020

ITEM 3 - DISCIPLINARY INFORMATION

Eric Faber has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Eric Faber'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

James Ferrell, Partner, Managing Director, is responsible for supervising Eric Faber's activities. James Ferrell monitors the advice provided by Eric Faber for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

SEAN T. LAMB, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Sean T. Lamb, CFP®, Senior Wealth Advisor, b. 1977

Education:

B.S., Business Administration, Towson University

Business Background:

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

Managing Director, Spotlight Asset Group, Inc., 2021-2021

Investment Adviser Representative, Creative Planning, LLC, 2014-2021

VP-Financial Consultant, Charles Schwab & Co, Inc., 2009-2014

Professional Designations

Sean Lamb 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

Sean Lamb has no material disciplinary history requiring disclosure under this item. Please see <http://www.adviserinfo.sec.gov> for additional information about Sean Lamb.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Sean Lamb'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

James Ferrell, Partner, Managing Director, is responsible for supervising Sean Lamb's activities. James Ferrell monitors the advice provided by Sean Lamb for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

CHRISTOPHER J. BUDNY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christopher J. Budny, CFP®, Wealth Advisor, b. 1993

Education:

BA, Business Administration in Finance, Temple University

Business Background:

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

Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-2023

Associate Financial Advisor, Wescott Financial Advisory Group, 2017-2021

Inheritance Consultant, The Vanguard Group, Inc, 2016-2017

Professional Designations

Christopher Budny holds the following professional designation:

Certified Financial Planner

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ITEM 3 - DISCIPLINARY INFORMATION

Christopher Budny has no material disciplinary history requiring disclosure under this item. Please see <http://www.adviserinfo.sec.gov> for additional information about Christopher Budny.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Christopher Budny's compensation comes from Beacon Pointe Advisors, LLC. He receives variable compensation that is based on the number of assets/clients he/she brings into Beacon Pointe.

ITEM 6 - SUPERVISION

James Ferrell, Partner, Managing Director, is responsible for supervising Christopher Budny's activities. James Ferrell monitors the advice provided by Christopher Budny for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

MICHAEL S. HIMMEL, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael S. Himmel, CFP®, Partner, Senior Wealth Advisor, b. 1963

Education:

B.A., Economics, Financial Management, Catholic University of America

Business Background:

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

Managing Member, Essex Asset Management, 2008-2021

Professional Designations

Michael Himmel 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 Himmel has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Michael Himmel’s role with Beacon Pointe Advisors, LLC, he serves as an investment consultant for Oriental Energy Group, Free Zone Establishment (FZE), an energy consulting, private limited liability company based in Ras Al Khaimah, United Arab Emirates. This activity is investment-related and accounts for a de minimis amount of Mr. Himmel’s time. Beacon Pointe, LLC, does not believe these activities present a conflict of interest.

ITEM 5 - ADDITIONAL COMPENSATION

In addition to his regular compensation from Beacon Pointe Advisors, LLC, Michael Himmel is eligible to receive compensation from the activities outlined above in **Item 4 – Other Business Activities**. Michael Himmel is also eligible to receive variable compensation that is based on the number of assets/clients he/she brings into Beacon Pointe.

ITEM 6 - SUPERVISION

James Ferrell, Partner, Managing Director, is responsible for supervising Michael Himmel's activities. James Ferrell monitors the advice provided by Michael Himmel for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

EDWARD R. MOOR

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Edward R. Moor, Wealth Advisor, b. 1992

Education:

B.S.B., Business, George Washington University School of Business

Business Background:

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

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

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

Senior Associate, Kite Capital Partners, 2017-2021

Valuation Analyst, Frazier Capital Valuation, 2015-2017

ITEM 3 - DISCIPLINARY INFORMATION

Edward Moor has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

In addition to his regular compensation from Beacon Pointe Advisors, LLC, Edward Moor is eligible to receive compensation from the activities outlined above in **Item 4 – Other Business Activities**. Edward Moor is also eligible to receive variable compensation that is based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

James Ferrell, Partner, Managing Director, is responsible for supervising Edward Moor's activities. James Ferrell monitors the advice provided by Edward Moor for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.

WILLIAM J. FERRELL, CFP®, CPA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William J. Ferrell, CFP®, CPA, Wealth Advisor, b. 1995

Education:

M.A., Accounting, University of Central Florida

B.S.B.A., Accounting and Finance, University of Central Florida

Business Background:

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

Regional Director, Goldman Sachs & Co. LLC, 2021-2024

Private Wealth Associate, Sanford C. Bernstein & Co., LLC, 2020-2021

Auditor, Ernst & Young, 2019-2020

Professional Designations

William Ferrell 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 Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

ITEM 3 - DISCIPLINARY INFORMATION

William Ferrell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 6 - SUPERVISION

James Ferrell, Partner, Managing Director, is responsible for supervising William Ferrell's activities. James Ferrell monitors the advice provided by William Ferrell for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. James Ferrell can be reached by calling 407-629-7008.