



Form ADV Part 2B Brochure Supplement

January 2026

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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ALEX R. NUNES, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alex R. Nunes, CFP®, Senior Wealth Advisor, b. 1980

Education:

MS, Homeland Security, San Diego State University
BS, Psychology, University of California, Santa Barbara

Business Background:

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present
Agent, Beacon Pointe Insurance Services, LLC, 2019-Present
Wealth Advisor, Beacon Pointe Advisors, LLC, 2019-2021

Professional Designations

Alex Nunes 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

Alex Nunes has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC (“BPA”), Alex Nunes 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 Alex Nunes may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Alex Nunes may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Alex Nunes 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 Alex Nunes or BPIS if they follow Mr. Nunes' recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Alex Nunes' compensation comes from Beacon Pointe Advisors, LLC. He receives a salary and variable compensation that is based on the assets under management in the client accounts he services. Mr. Nunes does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients. The additional compensation that Alex Nunes is eligible to receive is outlined above in ***Item 4 – Other Business Activities***.

ITEM 6 - SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

Mark Flint, Partner, Managing Director, is generally responsible for supervising Alex Nunes' day-to-day advisory activities. Mr. Flint can be reached by calling 858-766-6524.

AUSTIN CASSIDY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Austin Cassidy, CFP®, Senior Financial Planner, b. 1996

Education:

BS, Finance, Penn State University

Business Background:

Senior Financial Planner, Beacon Pointe Advisors, LLC, 2025-Present

Financial Planner, Beacon Pointe Advisors, LLC, 2024-2025

Agent, Beacon Pointe Insurance Services, LLC, 2024-Present

Methodology Analyst, Vanguard, 2019-2024

Professional Designations

Austin Cassidy 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

Austin Cassidy has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC (“BPA”), Austin Cassidy 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 Austin Cassidy may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Austin Cassidy may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Austin Cassidy 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 Austin Cassidy or BPIS if they follow Mr. Cassidy's recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Austin Cassidy is a salaried employee of Beacon Pointe Advisors, LLC, and does not receive compensation based on client assets or advisory fees. However, he is eligible to receive a one-time referral bonus based on a percentage of the estimated first-year revenue generated from new clients he refers to the firm. Mr. Cassidy does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients. The additional compensation that Austin Cassidy is eligible to receive is outlined above in *Item 4 – Other Business Activities*.

ITEM 6 - SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

Mark Flint, Partner, Managing Director, is generally responsible for supervising Austin Cassidy's day-to-day advisory activities. Mr. Flint can be reached by calling 858-766-6524.

CONNOR G. CIRILLO

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Connor G. Cirillo, Client Service Associate, b. 2001

Education:

BS, Business, University of Southern California

Business Background:

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present

Client Service Associate, Beacon Pointe Advisors, LLC, 2024-2025

Intern, Zignal Labs, 2023-2023

Intern, Unify Consulting, 2022-2022

Student, University of Southern California, 2019-2023

ITEM 3 - DISCIPLINARY INFORMATION

Connor Cirillo has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Connor Cirillo is a salaried employee of Beacon Pointe Advisors, LLC, and does not receive compensation based on client assets or advisory fees. However, he is eligible to receive a one-time referral bonus based on a percentage of the estimated first-year revenue generated from new clients he refers to the firm. Mr. Cirillo does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients.

ITEM 6 - SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

Jeffrey Mantoani, Director of Operations, is generally responsible for supervising Connor Cirillo's day-to-day advisory activities. Mr. Mantoani can be reached by calling 858-766-6524.

MARK D. FLINT, CFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark D. Flint, CFA®, Partner, Managing Director, b. 1971

Education:

MBA, International Finance, University of San Diego

BA, International Relations and Affairs, University of San Diego

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2022-Present

Agent, Beacon Pointe Insurance Services, LLC, 2016-2023

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2016-2021

Professional Designations

Mark Flint 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

Mark Flint has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Mark Flint is a partner of Beacon Pointe Advisors, LLC, and is compensated by the firm with a salary and variable compensation based on client assets under management. Mark Flint is an equity owner in the parent company of the firm. Mr. Flint does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients.

ITEM 6 – SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Mark Flint oversees the investment advisory services provided by Beacon Pointe Advisors' San Diego, California office. He is not subject to day-to-day supervision by another individual. However, Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements and firm policies.

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

MICHAEL S. BAKOS

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael S. Bakos, Regional Director, b. 1974

Education:

BA, Finance, Governors State University College of Business

Business Background:

Regional Director, Beacon Pointe Advisors, LLC, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-2023

Vice President, Wealth Management Advisor, First American Trust, 2020-2021

Senior Vice President, Investment Adviser Representative, Alpha Cubed Investments., 2018-2020

ITEM 3 - DISCIPLINARY INFORMATION

Michael Bakos has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Michael Bakos' compensation comes from Beacon Pointe Advisors, LLC. He receives a salary and variable compensation that is based on the assets under management in the client accounts he services. Mr. Bakos does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients.

ITEM 6 - SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

Matthew DiQuollo, National Regional Director, is generally responsible for supervising Michael Bakos' day-to-day advisory activities. Mr. DiQuollo can be reached by calling 973-287-5437.

PHILIP C. HAGOPIAN, AWMA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Philip C. Hagopian, AWMA®, Wealth Advisor, b. 1979

Education:

BSBA, Finance, Northeastern University

Business Background:

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

Investment Advisor Representative, Westmount Asset Management, LLC 2021-2023

Vice President, Wealth Advisor, Lido Advisors, LLC, 2021-2021

Registered Representative, Investment Advisor, Centaurus Financial, Inc., 2020-2021

Registered Representative, The Leaders Group, Inc., 2019-2020

Hybrid Marketer, The Annuity Store (TruChoice), 2013-2020

Professional Designations

Philip Hagopian holds the following professional designation:

Accredited Wealth Management Advisor (AWMA™)

The Accredited Wealth Management Advisor, or AWMA™ program, is issued by the College for Financial Planning – a Kaplan Company. The program is designated for advisors who want to better address the unique needs of high-net-worth clients. The program’s one-of-a-kind curriculum contains sections dedicated to behavioral finance, working with small business owners, and succession/exit planning. Individuals who hold the AWMA™ designation have completed a course of study encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives, and asset protection alternatives. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. More information about the AWMA™ is available at <https://www.kaplanfinancial.com/wealth-management>.

ITEM 3 - DISCIPLINARY INFORMATION

Philip Hagopian has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Philip Hagopian’s compensation comes from Beacon Pointe Advisors, LLC. He receives a salary and variable compensation that is based on the assets under management in the client accounts he services.

Mr. Hagopian does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients.

ITEM 6 - SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

Mark Flint, Partner, Managing Director, is generally responsible for supervising Philip Hagopian's day-to-day advisory activities. Mr. Flint can be reached by calling 858-766-6524.

ROBERT H. INGHAM, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert H. Ingham, CFP®, Partner, Senior Wealth Advisor, b. 1960

Education:

MBA, Finance, San Diego State University
BS, Management, University of Massachusetts

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Agent, Beacon Pointe Insurance Services, LLC, 2023-Present
Investment Advisor Representative, Ingham Wealth Management, 2008-2024
Registered Representative, Arete Wealth Management LLC, 2018-2023

Professional Designations

Robert Ingham holds the following professional designation:

Certified Financial Planner (CFP®)

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

ITEM 3 - DISCIPLINARY INFORMATION

Robert Ingham has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC (“BPA”), Robert Ingham 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 Robert Ingham may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Robert Ingham may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Robert Ingham 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 Robert Ingham or BPIS if they follow Mr. Ingham's recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Robert Ingham is a partner of Beacon Pointe Advisors, LLC, and is compensated by the firm with a salary and variable compensation based on client assets under management. Robert Ingham is an equity owner in the parent company of the firm. Mr. Ingham does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients. The additional compensation that Robert Ingham is eligible to receive is outlined above in ***Item 4 – Other Business Activities***.

ITEM 6 – SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

Mark Flint, Partner, Managing Director, is generally responsible for supervising Robert Ingham's day-to-day advisory activities. Mr. Flint can be reached by calling 858-766-6524.