



Form ADV Part 2B Brochure Supplement

March 20, 2023

Individuals covered by this supplement include:

John Martindale
Tiffany Bodell
Dane Jensen

Office Location:

272 E 12200 S, Suite 100
Draper, UT 84020
801-501-0302

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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JOHN MARTINDALE, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

John Martindale, CFP®, Partner, Managing Director, b. 1960

Education:

BS, Finance, Brigham Young University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2023-Present

Licensed Insurance Agent, Beacon Pointe Insurance Services, LLC, 2023-Present

Advisor Representative, Alisa Capital, INC., 2011-2023

Registered Representative, DFIG Investments, INC., 2011-2011

Advisor, OMNI Investment Advisors, INC., 2002-2011

Professional Designations

John Martindale 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 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

John Martindale has no material disciplinary history requiring disclosure under this item. Please see www.adviserinfo.sec.gov for additional information about John Martindale.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

John Martindale compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that John Martindale is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

John Martindale does not receive economic benefits from any person or entity other than Beacon Pointe in connection with the provision of investment advice to clients.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, John Martindale oversees the investment advice provided from Beacon Pointe Advisors' Draper, UT 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 is the supervisor of John Martindale. She can be reached by calling 949-718-1600.

TIFFANY BODELL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Tiffany Bodell, Wealth Advisor, b. 1979

Education:

BA, Economics, University of Utah

Business Background:

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

Investment Adviser, Ailsa Capital, INC., 2015-2023

Client Service Associate, Hightower Securities, LLC., 2011-2015

Private Lending Specialist, Goldman Sachs, 2005-2011

Loan Servicing, Merrill Lynch, 2003-2005

ITEM 3 – DISCIPLINARY INFORMATION

Tiffany Bodell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Tiffany Bodell 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, Tiffany Bodell is eligible to receive variable compensation based on the number of assets/clients she brings into Beacon Pointe.

Tiffany Bodell does not receive economic benefits from any person or entity other than Beacon Pointe in connection with the provision of investment advice to clients.

ITEM 6 - SUPERVISION

John Martindale, Partner, Managing Director, is responsible for supervising Tiffany Bodell's activities. John Martindale monitors the advice provided by Tiffany Bodell for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. John Martindale can be reached by calling 801-501-0302.

DANE JENSEN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Dane Jensen, Wealth Advisor, b. 1987

Education:

BA, Economics and International Relations, Westminster College

Business Background:

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

Investment Advisor, Ailsa Capital, INC., 2019-2023

Financial Representative, Mountain West Advisors, 2018-2019

Sales Representative, Stryker, 2016-2018

ITEM 3 - DISCIPLINARY INFORMATION

Dane Jensen has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Dane Jensen’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. The additional compensation that Dane Jensen is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

Dane Jensen does not receive economic benefits from any person or entity other than Beacon Pointe in connection with the provision of investment advice to clients.

ITEM 6 - SUPERVISION

John Martindale, Partner, Managing Director, is responsible for supervising Dane Jensen’s activities. John Martindale monitors the advice provided by Dane Jensen for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. John Martindale can be reached by calling 801-501-0302.



Privacy Notice

(as required by SEC Regulation S-P)

At Beacon Pointe Advisors, LLC, we understand that privacy is an important concern of our customers. The nature of our business requires that we collect nonpublic personal information about you. Nonpublic personal information is personally identifiable financial information including, for example, your social security number, date of birth, income, account number and balance, account transaction history, and other financial information. We collect nonpublic personal information from the following sources:

- Information we receive about you in various agreements, applications, account opening documentation, and other forms and paperwork that pertains to your relationship with us,
- Information about your transactions with us and our service providers, or others,
- Information that you give us orally.

All financial companies need to share customers' personal information to run their everyday business. We disclose nonpublic personal information to our affiliated firms and to nonaffiliated third parties (including, but not limited to, our consultants, custodians, money managers, brokers, customer relationship management and financial planning software providers) as required or permitted by law and as needed to fulfill our compliance obligations and/or for us to best provide those products and services that we have agreed to provide to you.

We restrict access to your personal and account information to those employees who need to know that information in order to provide products and services to you. We maintain physical, electronic, and procedural safeguards to protect your nonpublic information.

The privacy policies and practices described in this notice will be maintained in the event you become an inactive customer or decide to close your account.

If, at any time in the future, it is necessary to disclose any of your personal information in a way that differs with this policy, we will give you advance notice of the proposed change and an opportunity to decline such disclosure.

Beacon Pointe Advisors is committed to protecting the confidentiality of your personal information. Let us know if you have any questions by contacting us at (949) 718-1600.