



Form ADV Part 2B Brochure Supplement

May 24, 2021

Individuals covered by this supplement include:

Michele T. Sarna

Brandt L. Kuhn

Located At:

73-833 El Paseo Drive, Suite 102
Palm Desert, CA 92260
760-237-8970

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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MICHELE T. SARNA, AWMA[®], AIF[®], CFP[®]

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michele T. Sarna, AWMA[®], AIF[®], CFP[®], Partner, Managing Director, b. 1966

Education:

MS, Finance, Walden University

BS, Business, California State University Long Beach

Business Background:

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

Partner, Managing Director, Beacon Pointe Wealth Advisors, LLC, 2017-2020

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2017-2020

Agent, Beacon Pointe Insurance Services, LLC, 2017-Present

Financial Advisor, Integrated Wealth Management, 2010-2017

Professional Designations

Michele Sarna holds the following professional designations:

Accredited Wealth Management Advisor (“AWMA”)

The Accredited Wealth Management Advisor (AWMA[®]) designation is issued by the College for Financial Planning. This professional designation program offers investment professionals with the precise, hands-on information needed to provide ample, planning-oriented wealth management advice. Study topics include understanding the wealth management process, recognizing the best investment solutions for clients, considering investments in terms of risk and return, understanding asset allocation and strategies, and considering the special planning needs of high-net-worth clients and small-business owners. Several modules focus on how investment needs relate to the broader areas of insurance, taxation, estate planning, and retirement issues. Regulation and ethics for the investment professional also are addressed. Holders of the AWMA[®] designation have passed a final exam and must abide by a professional code of ethics that sets forth minimum standards of acceptable professional conduct. They are also required to maintain their knowledge and proficiency by fulfilling a minimum continuing education requirement. <http://www.cffpinfo.com/awma/>

Accredited Investment Fiduciary (“AIF”)

The AIF[®] designation is issued by the Center for Fiduciary Studies. To earn the designation, each AIF[®] candidate must complete either a web-based or capstone program, pass a final certification exam, and complete a minimum of 6 hours of continuing education per year. AIF[®] designees must also sign and agree to abide by a code of ethics. More information regarding the AIF[®] is available at http://www.fi360.com/main/designations_aif.jsp.

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

Michele Sarna has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Michele Sarna’s compensation comes from her regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Michele Sarna 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, oversees the investment advice provided from Beacon Pointe Advisors’ Palm Desert, California office. Her advice is not monitored by any other individual.

Michele Sarna is supervised by Shannon Eusey, Chief Executive Officer and Chief Compliance Officer. She can be reached by calling 949-718-1600.

BRANDT L. KUHN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brandt L. Kuhn, CFP®, Partner, Managing Director, b. 1986

Education:

BA, Business Administration, California Polytechnic State University, San Luis Obispo

Business Background:

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

Partner, Managing Director, Beacon Pointe Wealth Advisors, LLC, 2017-2020

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2017-2020

Agent, Beacon Pointe Insurance Services, LLC, 2017-Present

Vice President and Senior Financial Advisor, Integrated Wealth Management, 2009-2017

Registered Representative, Purshe Kaplan Sterling Investments, 2010-2017

Professional Designations

Brandt Kuhn 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

Brandt Kuhn has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

Brandt Kuhn also serves on the board of the Desert Recreation District Foundation, the Advisory Board of the First Tee of the Coachella Valley, and the Palm Desert Chamber of Commerce. These activities account for a de minimis amount of Brandt Kuhn's time and income. Beacon Pointe Advisors, LLC, does not believe these activities present a conflict of interest.

ITEM 5 - ADDITIONAL COMPENSATION

Brandt Kuhn's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Brandt Kuhn 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, Brandt Kuhn oversees the investment advice provided from Beacon Pointe Advisors' Palm Desert, California office. His advice is not monitored by any other individual.

Brandt Kuhn is supervised by Shannon Eusey, Chief Executive Officer and Chief Compliance Officer. She can be reached by calling 949-718-1600.