



## Form ADV Part 2B Brochure Supplement

July 2025

### Individuals covered by this supplement include:

Brandt L. Kuhn  
Michele T. Sarna

[www.beaconpointe.com](http://www.beaconpointe.com)

#### **Located At:**

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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](http://www.adviserinfo.sec.gov)

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# BRANDT L. KUHN, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

### *Education:*

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

### *Business Background:*

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

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

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

## Professional Designations

Brandt Kuhn 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

Brandt Kuhn has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

In addition to Brandt Kuhn's role with Beacon Pointe Advisors, LLC, he 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. This activity is unrelated to Beacon Pointe Advisors, LLC's advisory business. Beacon Pointe Advisors, LLC, does not believe it presents 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***.

Brandt Kuhn 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, Brandt Kuhn oversees the investment advice provided from Beacon Pointe Advisors' Palm Desert, California 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 for Brandt Kuhn. She can be reached by calling 949-718-1600.

# 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

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

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

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

## Professional Designations

Michele Sarna holds the following professional designations:

### *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>.

### *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 about the AIF® is available at <https://www.fi360.com/>.

### *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

Michele Sarna has no disciplinary history to disclose.

### ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role at Beacon Pointe Advisors, LLC ("BPA"), Michele Sarna 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 Michele Sarna may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Michele Sarna may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Michele Sarna 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 Michele Sarna or BPIS if they 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**.

Michele Sarna 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, oversees the investment advice provided from Beacon Pointe Advisors' Palm Desert, 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 for Michele Sarna. She can be reached by calling 949-718-1600.