



Form ADV Part 2B Brochure Supplement

June 27, 2024

Individuals covered by this supplement include:

Lewis D. Akers, Jr.
Kyle R. Boyd

Brendan M. Reidy
Logan L. Bolick

Jacquelyn S. Friedrich
Jonathan E. Shumate

Jeffrey B. Howden
Mary Margaret Kiser

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Newport Beach, CA 92660
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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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LEWIS DANIEL AKERS, JR., CFP®, CPA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Lewis D. Akers, Jr., CFP®, CPA, Partner, Managing Director, b. 1960

Education:

MBA, Master of Business Administration, Wake Forest University
BA, Spanish, University of Virginia

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2022-Present
Agent, Beacon Pointe Insurance Services, LLC, 2022- Present
Managing Principal, Altavista Wealth Management, Inc., 2004-2022

Professional Designations

L. Daniel Akers, Jr. holds the following professional designations:

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>.

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

L. Daniel Akers, Jr. has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

In addition to L. Daniel Akers, Jr.’s role with Beacon Pointe Advisors, LLC, he is the sole owner of L. Daniel Akers, Jr., CPA. He performs tax return preparation for non-clients and some clients for compensation. This compensation is exclusive of compensation paid through Beacon Pointe Advisors, LLC.

ITEM 5 - ADDITIONAL COMPENSATION

L. Daniel Akers, Jr.’s compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that L. Daniel Akers, Jr. 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, L. Daniel Akers, Jr. oversees the investment advice provided from Beacon Pointe Advisors’ Asheville, NC, 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 L. Daniel Akers. She can be reached by calling 949-718-1600.

KYLE R. BOYD

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kyle R. Boyd, Partner, Managing Director, b. 1959

Education:

JD, Juris Doctor, Samford University

BS, History, University of Alabama

Certificate, American Bankers' Association, National Trust School

Business Background:

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

Managing Principal, Altavista Wealth Management, Inc., 2004-2022

ITEM 3 - DISCIPLINARY INFORMATION

Kyle Boyd has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Kyle Boyd's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Kyle Boyd oversees the investment advice provided from Beacon Pointe Advisors' Asheville, NC, 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 Kyle Boyd. She can be reached by calling 949-718-1600.

BRENDAN M. REIDY, JR.

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brendan M. Reidy, Jr., Regional Director, b. 1977

Education:

BA, History, Dartmouth College

Business Background:

Regional Director, Beacon Pointe Advisors, LLC, 2023-Present

Senior Wealth Advisor, The Mather Group LLC., 2021-2022

Regional Vice President, Mercer Global Advisors INC., 2020-2021

Vice President, Churchill Management Group, 2017-2020

Portfolio Manager VP, US Trust Bank of America, 2015-2017

ITEM 3 - DISCIPLINARY INFORMATION

Brendan Reidy has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 6 - SUPERVISION

L. Daniel Akers, Jr., Partner, Managing Director, is responsible for supervising Brendan Reidy's activities. Mr. Akers monitors the advice provided by Brendan Reidy for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. He can be reached by calling 828-684-2600.

LOGAN L. BOLICK, CFP®, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Logan L. Bolick, CFP®, CFA, Principal, Senior Wealth Advisor, b. 1990

Education:

BS, Business Administration, University of North Carolina at Chapel Hill, Kenan-Flagler Business School

Business Background:

Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present

Director of Research, Financial Advisor, Altavista Wealth Management, 2017-2022

Financial Advisor Associate, Altavista Wealth Management, 2013-2017

Professional Designations

Logan Bolick holds the following professional designations:

Chartered Financial Analyst

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/>

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

Logan Bolick has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Logan Bolick'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

L. Daniel Akers, Jr., Partner, Managing Director, is responsible for supervising Logan Bolick's activities. Mr. Akers monitors the advice provided by Logan Bolick for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. He can be reached by calling 828-684-2600.

JACQUELYN S. FRIEDRICH, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacquelyn S. Friedrich, CFP®, Principal, Senior Wealth Advisor, b. 1963

Education:

BS, Accounting, University of North Carolina-Asheville

Business Background:

Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present
Investment Adviser Representative, Altavista Wealth Management, 2008-2022

Professional Designations

Jacquelyn Friedrich holds the following professional designation:

Certified Financial Planner

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ITEM 3 - DISCIPLINARY INFORMATION

Jacquelyn Friedrich has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Jacquelyn Friedrich’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

L. Daniel Akers, Jr., Partner, Managing Director, is responsible for supervising Jacquelyn Friedrich's activities. Mr. Akers monitors the advice provided by Jacquelyn Friedrich for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. He can be reached by calling 828-684-2600.

JONATHAN E. SHUMATE, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jonathan E. Shumate, CFP®, Principal, Senior Wealth Advisor, b. 1974

Education:

BBA, Marketing, James Madison University

Business Background:

Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present

Senior Financial Advisor, Altavista Wealth Management, 2016-2022

Professional Designations

Jonathan Shumate holds the following professional designation:

Certified Financial Planner

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ITEM 3 - DISCIPLINARY INFORMATION

Jonathan Shumate has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Jonathan Shumate 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

L. Daniel Akers, Jr., Partner, Managing Director, is responsible for supervising Jonathan Shumate's activities. Mr. Akers monitors the advice provided by Jonathan Shumate for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. He can be reached by calling 828-684-2600.

JEFFREY B. HOWDEN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jeffrey B. Howden, Senior Wealth Advisor, b. 1972

Education:

MBA, University of Pittsburgh, Katz Graduate School of Business

MA, University of North Carolina Chapel Hill

BA, Business Administration, Furman University

Business Background:

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present

Chief Investment Strategist, Director of Family Office Services, Altavista Wealth Management, 2015-2022

ITEM 3 - DISCIPLINARY INFORMATION

Jeff Howden has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Jeff Howden's role with Beacon Pointe Advisors, LLC, he is a limited partner of WWM Partners (two private real estate funds). Jeff Howden is also a member of Eagle View Properties, LLC. He serves as a trustee for a non-client family trust and receives compensation for acting in this capacity.

ITEM 5 - ADDITIONAL COMPENSATION

Jeff Howden'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 Jeff Howden receives is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 - SUPERVISION

L. Daniel Akers, Jr., Partner, Managing Director, is responsible for supervising Jeff Howden's activities. Mr. Akers monitors the advice provided by Jeff Howden for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. He can be reached by calling 828-684-2600.

MARY MARGARET KISER, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mary Margaret Kiser, CFP®, Wealth Advisor, b. 1988

Education:

BS, Political Science, University of the South - Sewanee

Business Background:

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

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-2023

Client Service Associate, Altavista Wealth Management, 2017-2022

Business Development Specialist, Cumberland Trust & Investment Co, 2015-2016

Professional Designations

Mary Kiser holds the following professional designation:

Certified Financial Planner

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ITEM 3 - DISCIPLINARY INFORMATION

Mary Margaret Kiser has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Mary Margaret Kiser 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, Mary Margaret Kiser is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 - SUPERVISION

L. Daniel Akers, Jr., Partner, Managing Director, is responsible for supervising Mary Margaret Kiser's activities. Mr. Akers monitors the advice provided by Mary Margaret Kiser for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. He can be reached by calling 828-684-2600.