



Form ADV Part 2B Brochure Supplement

September 14, 2023

Individuals covered by this supplement include:

William W. Diehl
Lindsey R. Crow
Pierce J. Halsted

Sarah R. Stubbs
Julie M. Anderson
Julie E. Montgomery

Office Location:

5960 Berkshire Lane
Suite 1175
Dallas, TX 75225
214-387-2559

Corporate Office:

24 Corporate Plaza Drive, Suite 150
Newport Beach, CA 92660
Main: 949-718-1600
Direct: 973-396-7409

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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WILLIAM W. DIEHL, CFA

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William W. Diehl, CFA, Partner, Managing Director, b. 1970

Education:

BA, Engineering and Math, Vanderbilt University
MBA, Business Administration, University of Texas

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2023-Present
Financial Advisor, UBS Financial Services Inc., 2009-2023
Vice President, Goldman, Sachs & Co., 2002-2009
Broker, Morgan Stanley & Co., Inc., 1998-2002

Professional Designations

William Diehl holds the following professional designation:

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/>

ITEM 3 – DISCIPLINARY INFORMATION

William Diehl has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 5 – ADDITIONAL COMPENSATION

William Diehl’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, William Diehl oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX 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 William Diehl. She can be reached by calling 949-718-1600.

LINDSEY R. CROW

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Lindsey R. Crow, Partner, Managing Director, b. 1966

Education:

BA, University of Arkansas

MBA, Arizona State University

MIM, Thunderbird School of Global Management

Business Background:

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

Financial Advisor, UBS Financial Services Inc., 2009-2013

Vice President, Goldman, Sachs & Co., 2002-2009

Associate, Morgan Stanley & Co., Inc., 1998-2002

ITEM 3 - DISCIPLINARY INFORMATION

Lindsey Crow has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Lindsey Crow's role with Beacon Pointe Advisors, LLC, he serves as a secretary for Cedar Families, LLC. This activity accounts for a de minimis amount of Lindsey Crow'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

Lindsey Crow's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Lindsey Crow 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, Lindsey Crow oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX 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 William Diehl. She can be reached by calling 949-718-1600.

PIERCE J. HALSTED

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Pierce J. Halsted, Senior Associate Wealth Advisor, b. 1997

Education:

BBA, Finance and Economics, Baylor University

Business Background:

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

Client Service Associate, UBS Financial Services Inc., 2019-2023

ITEM 3 – DISCIPLINARY INFORMATION

Pierce Halsted has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Pierce Halsted 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, Pierce Halsted is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

William Diehl, Partner, Managing Director is responsible for supervising Pierce Halsted's activities.

William Diehl monitors the advice provided by Pierce Halsted for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. William Diehl can be reached by calling 214-387-2559.

SARAH R. STUBBS

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Sarah R. Stubbs, Associate Wealth Advisor, b. 1991

Education:

BBS, Business (Finance and Accounting Information Systems), San Jose State University

Business Background:

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

Wealth Strategy Associate, UBS Financial Services Inc., 2018-2023

ITEM 3 – DISCIPLINARY INFORMATION

Sarah Stubbs has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Sarah Stubbs 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, Sarah Stubbs is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

William Diehl, Partner, Managing Director is responsible for supervising Sarah Stubb's activities. William Diehl monitors the advice provided by Sarah Stubbs for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. William Diehl can be reached by calling 214-387-2559.

JULIE M. ANDERSON

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Julie M. Anderson, Senior Relationship Manager, b. 1980

Education:

BBA, Finance, University of Texas at Tyler

Business Background:

Senior Relationship Manager, Beacon Pointe Advisors, LLC, 2023-Present

Registered Client Service Associate, UBS Financial Services Inc., 2011-2023

Financial Advisor, Edward Jones, 2010-2011

Senior Regulatory Branch Service Associate, UBS Financial Services Inc., 2009-2010

Branch Service Associate, UBS Financial Services Inc., 2006-2009

ITEM 3 – DISCIPLINARY INFORMATION

Julie Anderson has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Julie Anderson 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, Julie Anderson is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

William Diehl, Partner, Managing Director is responsible for supervising Julie Anderson's activities.

William Diehl monitors the advice provided by Julie Anderson for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. William Diehl can be reached by calling 214-387-2559.

JULIE E. MONTGOMERY

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Julie E. Montgomery, Senior Relationship Manager, b. 1961

Education:

BA, Business Management, Arkansas State University

Business Background:

Senior Relationship Manager, Beacon Pointe Advisors, LLC, 2023-Present

Client Service Associate, UBS Financial Services Inc., 2014-2023

Client Service Associate, Merrill Lynch, Pierce, Fenner & Smith Inc., 1997-2014

ITEM 3 – DISCIPLINARY INFORMATION

Julie Montgomery has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Julie Montgomery 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, Julie Montgomery is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

William Diehl, Partner, Managing Director is responsible for supervising Julie Montgomery's activities. William Diehl monitors the advice provided by Julie Montgomery for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. William Diehl can be reached by calling 214-387-2559.