



Form ADV Part 2B Brochure Supplement

July 03, 2024

Individuals covered by this supplement include:

Michael D. Joslin
Christopher L. Bentley
David A. Monsees

Office Location:
11431 Willows Road NE
Suite 120
Redmond, WA 98052
425-688-0555

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

Table of Contents

MICHAEL D. JOSLIN, CIMA[®], CPA, PFS[™]	3
CHRISTOPHER L. BENTLEY	5
DAVID A. MONSEES	6

MICHAEL D. JOSLIN, CIMA®, CPA, PFS™

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael D. Joslin, CIMA®, CPA, PFS™, Partner, Managing Director, b. 1957

Education:

BA, Accounting, University of Washington

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2024-Present

Chief Executive Officer, Joslin Capital Advisors, LLC, 2017-2024

Registered Representative, KMS Financial Services, Inc., 1999-2017

Professional Designations

Michael Joslin holds the following professional designation(s):

Certified Investment Management Analyst (“CIMA”)

The CIMA designation is issued by the Investments and Wealth Institute (formerly IMCA). To earn each certification, each CIMA candidate must complete a self-study program, attend a one-week classroom education program provided by an Association to Advance Collegiate Schools of Business (“AACSB”) accredited university business school, pass an online examination after self-study and an on-line comprehensive certification examination after meeting all requirements of a registered classroom education program and also complete a minimum of 30 hours of continuing education every two years. More information regarding the CIMA is available at <https://investmentsandwealth.org/home>.

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.

Personal Financial Specialist (PFS™)

The Personal Financial Specialist (PFS) credential is granted exclusively to CPAs with tax expertise and comprehensive knowledge of financial planning. All areas of personal financial planning — estate, retirement, investments and insurance — have tax implications, and only a CPA/PFS has the experience, ethics and expertise to get the job done right. The American Institute of Certified Public Accountants (AICPA) established the Personal Financial Specialist (PFS) credential, which is reserved for CPAs, meaning holding a CPA is a prerequisite. There are both educational and professional requirements that must be met before earning a PFS. However, the benefits of holding a PFS are numerous, which include expanded employment opportunities with corporations, consulting firms, and the ability to manage or own a wealth management practice. More information regarding the PFS is available at <https://www.aicpa-cima.com/home>.

ITEM 3 – DISCIPLINARY INFORMATION

Michael Joslin has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 5 – ADDITIONAL COMPENSATION

Michael Joslin’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, Michael Joslin oversees the investment advice provided from Beacon Pointe Advisors’ Redmond, WA’s 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 Michael Joslin. She can be reached by calling 949-718-1600.

CHRISTOPHER L. BENTLEY

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christopher L. Bentley, Wealth Advisor, b. 1970

Education:

BB, Administration, Skidmore College

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present

Financial Advisor, Joslin Capital Advisors, LLC, 2022-2024

Financial Consultant, TD Ameritrade, 2017-2022

AVP Financial Solutions Advisor, Bank of America, N.A., 2012-2017

ITEM 3 – DISCIPLINARY INFORMATION

Christopher Bentley has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Christopher Bentley 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, Christopher Bentley is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

Michael Joslin, Partner, Managing Director, is responsible for supervising Christopher Bentley's activities. Michael Joslin monitors the advice provided by Christopher Bentley for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Michael Joslin can be reached by calling 425-688-0555.

DAVID A. MONSEES

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David A. Monsees, Wealth Advisor, b. 1988

Education:

BS, Electrical Engineering, North Carolina State University

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present

Investment Advisor Representative, Joslin Capital Advisors, LLC, 2023-2024

Client Service Associate, Joslin Capital Advisors, LLC, 2022-2023

Investment Advisor Representative, First Command Advisory Services, Inc., 2021-2022

Insurance Agent, First Command Insurance Services, Inc., 2021-2022

ITEM 3 – DISCIPLINARY INFORMATION

David Monsees has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 6 – SUPERVISION

Michael Joslin, Partner, Managing Director, is responsible for supervising David Monsees' activities. Michael Joslin monitors the advice provided by David Monsees for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Michael Joslin can be reached by calling 425-688-0555.