



Form ADV Part 2B Brochure Supplement

December 20, 2024

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Maria Faleyev
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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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ELIZABETH L. BIVINGS, CFP®, CDFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Elizabeth L. Bivings, CFP®, CDFA®, Partner, Managing Director, b. 1958

Education:

PhD, MA, Applied Economics, Food Research Institute, Stanford University

MSc, Economics, London School of Economics and Political Science

MA, International Trade and Finance, University of Sussex, England

AB, International Relations, Pomona College

Business Background:

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

Founder and CEO, Artemis Financial Advisors, 2008-2024

Managing Director, Stax Inc., 2003-2006

Partner, The Monitor Group, 1992-2002

Professional Designations

Elizabeth Bivings holds the following professional designations:

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 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 Divorce Financial Analyst

The designation is issued by the Institute for Divorce Financial Analysts. The candidate is required to develop their theoretical and practical understanding and knowledge of the financial aspects of divorce by completing a comprehensive course of study. The candidate must also have two years’ minimum experience in a financial or legal capacity. The candidate must complete a four-part exam and demonstrate the practical application of this knowledge. Continuing education of 30 hours every two

years is required to maintain the designation. More information on the CDFA® can be found at: <https://www.institutedfa.com/>

ITEM 3 - DISCIPLINARY INFORMATION

Elizabeth Bivings has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Elizabeth Bivings compensation comes from her regular salary and ownership of Beacon Pointe Advisors, LLC. In addition, Elizabeth Bivings is eligible to receive variable compensation based on the number of assets/clients she brings into Beacon Pointe.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Elizabeth Bivings oversees the investment advice provided from Beacon Pointe Advisors' Boston, Massachusetts office. Ms. Bivings' 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 of Elizabeth Bivings. She can be reached by calling 949-718-1600.

MARK P. HASER, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark P. Haser, CFP®, Partner, Senior Wealth Advisor, b. 1983

Education:

MBA, Boston College

BA, Economics, Wake Forest University

Business Background:

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

Partner, Wealth Advisor, Artemis Financial Advisors, 2018-2024

Manager, Kyruus, 2017-2018

Senior Associate, Athenahealth, 2015-2017

Sales Manager, iGATE, 2013-2015

Professional Designations

Mark Haser 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 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

Mark Haser has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Mark Haser's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. In addition, Mark Haser is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

As a Partner, Senior Wealth Advisor at Beacon Pointe Advisors, LLC, Mark Haser oversees the investment advice provided from Beacon Pointe Advisors' Boston, Massachusetts office. Mr. Haser's 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 Mark Haser. She can be reached by calling 949-718-1600.

MARIA FALEYEV

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Maria Faleyev, Strategic Investment Advisor, b. 1997

Education:

BA, Economics and Finance, Bentley University

Business Background:

Strategic Investment Advisor, Beacon Pointe Advisors, LLC, 2024-Present

Portfolio Associate, Artemis Financial Advisors, 2022-2024

Performance Analyst, Meketa Investment Group, 2020-2022

ITEM 3 - DISCIPLINARY INFORMATION

Maria Faleyev has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Maria Faleyev 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, Maria Faleyev is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 - SUPERVISION

Elizabeth Bivings, Partner, Managing Director, is responsible for supervising Maria Faleyev's activities. Elizabeth Bivings monitors the advice provided by Maria Faleyev for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Elizabeth Bivings can be reached by calling 617-542-2420.