



Form ADV Part 2B Brochure Supplement

January 23, 2025

Individuals covered by this supplement include:

Allison R. Kvikstad
Valerie I. Marquez

Office Locations:

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Plano, TX 75024
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Campbell, CA 95008
408-261-3300

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

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ALLISON R. KVIKSTAD, CFP®, CDFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Allison R. Kvikstad, CFP®, CDFA®, Partner, Managing Director, b. 1971

Education:

MA, Finance, Golden Gate University

Business Background:

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

Financial Advisor, Ellevest, 2018-2024

Sr. Investment Strategist, Wells Fargo Bank, 2006-2018

Professional Designations

Allison Kvikstad 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

Allison Kvikstad has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Allison Kvikstad 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 salary and ownership of Beacon Pointe Advisors, LLC, Allison Kvikstad 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, Allison Kvikstad's 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 Allison Kvikstad. She can be reached by calling 949-718-1600.

VALERIE I. MARQUEZ

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Valerie I. Marquez, Associate Wealth Advisor, b. 1988

Education:

BA, Political Science, University of California, San Diego

Business Background:

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

Client Service Manager, Ellevest, 2022-2024

Sr. Client Service Associate, Tolleson Wealth Management, 2017-2022

Private Client Banker, JP Morgan Change, 2015-2017

ITEM 3 - DISCIPLINARY INFORMATION

Valerie Marquez has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Valerie Marquez 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, Valerie Marquez is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 - SUPERVISION

Allison Kvikstad, Partner, Managing Director, is responsible for supervising Valerie Marquez's activities. Allison Kvikstad monitors the advice provided by Valerie Marquez for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Allison Kvikstad can be reached by calling 408-261-3300.