



Form ADV Part 2B Brochure Supplement

November 4, 2024

Individuals covered by this supplement include:

Marc S. Wolff Gregory L. Gionfriddo
James P. Cooper Mark D. Generales

Office Location:

1943 Morrill Street, Suite 1
Sarasota, FL 34236
(941) 308-0041

9240 Bonita Beach Road
Suite 2211
Bonita Springs, FL 32789
(239) 676-5676

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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MARC S. WOLFF

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Marc S. Wolff, Partner, Managing Director, b. 1969

Education:

BS/BA, Finance, University of Florida

Business Background:

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

Agent, Beacon Pointe Insurance Services, LLC, 2022-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2022-2024

President, Chief Compliance Officer, Southern Trust Financial Planning, Inc., 2004-2021

Registered Representative, Securities America, Inc., 2009-2022

ITEM 3 - DISCIPLINARY INFORMATION

Marc Wolff has no material disciplinary history requiring disclosure under this item. Please see www.adviserinfo.sec.gov for additional information about Marc Wolff.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

Mr. Wolff is also a Manager of Chelle Bug, LLC, through which he owns a salon and spa. This activity is not investment-related, and accounts for a de minimis portion of Mr. Wolff’s time.

ITEM 5 - ADDITIONAL COMPENSATION

Marc Wolff’s compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Marc Wolff 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, Marc Wolff oversees the investment advice provided from Beacon Pointe Advisors’ Sarasota, FL, 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 Marc Wolff. She can be reached by calling 949-718-1600.

JAMES P. COOPER

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

James P. Cooper, Partner, Senior Wealth Advisor, b. 1969

Education:

MS, Economics, Florida State University

BS, Economics/Finance, Florida State University

Business Background:

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

Agent, Beacon Pointe Insurance Services, LLC, 2022-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2022-2024

Senior Vice President of Investments, Investment Advisor Representative, Southern Trust Financial Planning, Inc., 2004-2022

Registered Representative, Securities America, Inc., 2009-2022

ITEM 3 - DISCIPLINARY INFORMATION

James Cooper has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

James Cooper’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. Additionally, Mr. Cooper is eligible to receive compensation through his ownership in Beacon Pointe. The additional compensation that James Cooper is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 - SUPERVISION

Marc Wolff, Partner, Managing Director, is responsible for supervising James Cooper’s activities. Marc Wolff monitors the advice provided by James Cooper for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Marc Wolff can be reached by calling (941) 308-0041.

GREGORY L. GIONFRIDDO

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Gregory L. Gionfriddo, Senior Wealth Advisor, b. 1969

Education:

BS, Social Science: Economics Concentration, Florida State University

Business Background:

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

Agent, Beacon Pointe Insurance Services, LLC, 2022-Present

Registered Representative, Purshe Kaplan Sterling Investments, Inc., 2022-2023

Senior Wealth Advisor, Southern Trust Financial Planning, Inc., 2018-2021

Registered Representative, Securities America Inc., 2018-2022

Senior Recruiter, HH Staffing Services, 2014-2018

ITEM 3 - DISCIPLINARY INFORMATION

Gregory Gionfriddo has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Gregory Gionfriddo’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 Gregory Gionfriddo is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 - SUPERVISION

Marc Wolff, Partner, Managing Director, is responsible for supervising Gregory Gionfriddo’s activities. Marc Wolff monitors the advice provided by Gregory Gionfriddo for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Marc Wolff can be reached by calling (941) 308-0041.

MARK D. GENERALES

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark D. Generales, Relationship Manager, b. 1950

Education:

Mark Generales has not received any higher education degrees after high school. However, he attended the University of Massachusetts from 1970-1974.

Business Background:

Relationship Manager, Beacon Pointe Advisors, LLC, 2024-Present
Agent, Beacon Pointe Insurance Services, LLC, 2022-Present
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-2024
Registered Representative, Purshe Kaplan Sterling Investments, Inc., 2022-2024
Senior Vice President of Investments, Southern Trust Financial Planning, Inc., 2009-2022
Registered Representative, Securities America Inc., 2009-2022

ITEM 3 - DISCIPLINARY INFORMATION

Mark Generales has no material disciplinary history requiring disclosure under this item. Please see www.adviserinfo.sec.gov for additional information about Mark Generales.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Mark Generales’ 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 Mark Generales is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 - SUPERVISION

Marc Wolff, Partner, Managing Director, is responsible for supervising Mark Generales’ activities. Marc Wolff monitors the advice provided by Mark Generales for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Marc Wolff can be reached by calling (941) 308-0041.