



Form ADV Part 2B Brochure Supplement

January 7, 2025

Individuals covered by this supplement include:

Joseph D. Schofield, III
Stephanie F. Mackara

Steven T. Bright
Jeffrey K. Giguere, Jr.

Merriweather K. Mulé
Erica R. Smith

Office Locations:

171 Church Street
Suite 140
Charleston, SC 29401
(843) 790-7093

1311 Chuck Dawley Blvd
Suite 101
Mount Pleasant, SC 29464
(843) 763-4499

135 South Main St,
Suite 900 & 1000
Greenville, SC 29601
(864) 235-1428

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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JOSEPH D. SCHOFIELD, III

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Joseph D. Schofield, III, Partner, Managing Director, b. 1967

Education:

BS, Administrative Management, Clemson University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

Chief Executive Officer, Partner, Capital Design Associates Group, LLC d/b/a CDA Group, 2009-2021

ITEM 3 - DISCIPLINARY INFORMATION

Joseph Schofield has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Joseph Schofield’s compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Joseph Schofield is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 – SUPERVISION

As Partner, Managing Director at Beacon Pointe Advisors, LLC, Joseph Schofield oversees the investment advice provided from Beacon Pointe Advisors, LLC’s, Greenville, South Carolina office. His advice is not monitored by any other individual. He is, however, bound by Beacon Pointe’s Code of Ethics.

Shannon Eusey, Partner, Chief Executive Officer, and Chief Compliance Officer is the supervisor of Joseph Schofield. She can be reached by calling 949-718-1600.

STEPHANIE F. MACKARA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Stephanie F. Mackara, Partner, Managing Director, b. 1972

Education:

JD, Delaware Law School, Widener University

MS, Psychology, West Chester University

Business Background:

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

President, Charleston Investment Advisors, LLC, 2017-2024

Wealth Advisor, DAM Advisor Services, LLC, 2018-2020

Investment Advisor Representative, The Wealth Management Alliance, LLC, 2014-2018

Registered Representative, Loring Ward, 2014-2016

Investment Officer Team Member, Concept Capital markets, LLC, 2013-2014

Chief Marketing Officer, Palladium, LLC, 2011-2021

ITEM 3 - DISCIPLINARY INFORMATION

Stephanie Mackara has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Stephanie Mackara 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, Stephanie Mackara is eligible to receive variable compensation that is based on the number of assets/clients she brings into Beacon Pointe. She is also eligible to receive compensation through her ownership in Beacon Pointe.

ITEM 6 - SUPERVISION

As Partner, Managing Director at Beacon Pointe Advisors, LLC, Stephanie Mackara oversees the investment advice provided from Beacon Pointe Advisors, LLC's, Mount Pleasant, South Carolina office. Her advice is not monitored by any other individual. She is, however, bound by Beacon Pointe's Code of Ethics.

Shannon Eusey, Partner, Chief Executive Officer, and Chief Compliance Officer is the supervisor of Stephanie Mackara. She can be reached by calling 949-718-1600.

JEFFREY K. GIGUERE, JR., CFP®, ChFC®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jeffrey K. Giguere, Jr., CFP®, ChFC®, Partner, Senior Wealth Advisor, b. 1986

Education:

BS, Finance, Wofford College

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

Chief Operating Officer, Capital Design Associates Group, LLC d/b/a CDA Group, 2009-2021

Professional Designations

Jeffrey Giguere holds the following professional designations:

Certified Financial Planner

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>.

Chartered Financial Consultant

The ChFC® designation has been a mark of excellence for financial planners for almost thirty years and currently requires more courses than any other financial planning credential. The curriculum covers extensive education and application training in all aspects of financial planning, income taxation, investments, and estate and retirement planning.

To attain the right to use the ChFC® marks, take a proctored exam for each course of study, have 3 years of full-time, relevant business experience within the five years preceding the awarding of the designation, and complete a minimum of 30 hours continuing education every two years. More information regarding the ChFC® can be found at <https://www.theamericancollege.edu/designations-degrees/ChFC>.

ITEM 3 - DISCIPLINARY INFORMATION

Jeffrey Giguere has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Jeffrey Giguere’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, he is eligible to receive compensation through his ownership in Beacon Pointe. The additional compensation that Jeffrey Giguere is eligible to receive is outlined above in ***Item 4 – Other Business Activities***.

ITEM 6 – SUPERVISION

Joseph Schofield, Partner, Managing Director, is responsible for overseeing Jeffrey Giguere’s activities. Joseph Schofield monitors the advice provided by Jeffrey Giguere for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Joseph Schofield can be reached by calling 843-790-7093.

STEVEN T. BRIGHT

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Steven T. Bright, Partner, Senior Wealth Advisor, b. 1984

Education:

BS, Human and Organizational Development, Vanderbilt University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present

Agent, Beacon Pointe Insurance Services, LLC, 2020-Present

Private Wealth Manager, Capital Design Associates Group, LLC d/b/a CDA Group, 2017-2021

Agency Director, Carolinas Wealth Management Group, 2007-2017

ITEM 3 - DISCIPLINARY INFORMATION

Steven Bright has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Steven Bright's compensation comes Beacon Pointe Advisors, LLC. He receives variable compensation that is based on the number of assets/clients he brings into Beacon Pointe. Additionally, he is eligible to receive compensation through his ownership in Beacon Pointe. The additional compensation that Steven Bright is eligible to receive is outlined above in *Item 4 – Other Business Activities*.

ITEM 6 – SUPERVISION

Joseph Schofield, Partner, Managing Director, is responsible for overseeing Steven Bright's activities. Joseph Schofield monitors the advice provided by Steven Bright for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Joseph Schofield can be reached by calling 843-790-7093.

MERRIWEATHER K. MULÉ, CFP®, CDFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Merriweather K. Mulé, CFP®, CDFA®, Senior Wealth Advisor, b. 1985

Education:

BS, Business Administration, Finance, College of Charleston

Business Background:

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

Wealth Strategist, CornerCap Wealth Advisors, 2020-2022

Client Service Manager, CornerCap Wealth Advisors, 2017-2019

Portfolio Manager, CornerCap Wealth Advisors, 2011-2014

Professional Designations

Merriweather Mulé holds the following professional designations:

Certified Financial Planner

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

Merriweather Mulé has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Merriweather Mulé's compensation comes from Beacon Pointe Advisors, LLC. She receives variable compensation that is based on the number of assets/clients she brings into Beacon Pointe.

ITEM 6 – SUPERVISION

Amanda Henderson, Director of Operations, is responsible for overseeing Merriweather Mulé's activities. Amanda Henderson monitors the advice provided by Merriweather Mulé for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Amanda Henderson can be reached by calling 843-790-7093.

QUINTIN A. PILE, CFP®, CPA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Quintin A. Pile, CFP®, CPA, Senior Wealth Advisor, b. 1994

Education:

BA, Accounting and Finance, Wofford College

MBA, Business Administration, St. Mary's University

Business Background:

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

Agent, Beacon Pointe Insurance Services, LLC, 2024-Present

Investment Advisor Representative, Greenwood Capital Associates, 2019-2024

Financial Advisor, Edward Jones, 2018-2019

Professional Designations

Quintin Pile holds the following professional designations:

Certified Financial Planner

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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 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.

ITEM 3 - DISCIPLINARY INFORMATION

Quintin Pile has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

In addition to his regular compensation from Beacon Pointe Advisors, LLC, Quintin Pile is eligible to receive compensation from the activities outlined above in **Item 4 – Other Business Activities**. Quintin Pile is also eligible to receive variable compensation that is based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 – SUPERVISION

Joseph Schofield, Partner, Managing Director, is responsible for overseeing Quintin Pile’s activities. Joseph Schofield monitors the advice provided by Quintin Pile for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Joseph Schofield can be reached by calling 843-790-7093.

ERICA R. SMITH, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Erica R. Smith, CFP®, Financial Planner, b. 1979

Education:

BS, Business Administration, Marketing and Management, University of South Carolina

Business Background:

Financial Planner, Beacon Pointe Advisors, LLC, 2024-Present

Vice President, Charleston Investment Advisors, LLC, 2017-2024

Investment Advisor Representative, BAM Advisor Services, LLC, 2018-2020

Administrative Assistant, The Wealth Management Alliance, LLC, 2014-2018

Office Manager, College Transition Connection, 2008-2016

Administrative Assistant, Donald Baily & Associates, 2008-2013

Professional Designations

Erica Smith holds the following professional designation:

Certified Financial Planner

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

Erica Smith has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Erica Smith 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, Erica Smith is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

Stephanie Mackara, Partner, Managing Director, is responsible for overseeing Erica Smith’s activities. Stephanie Mackara monitors the advice provided by Erica Smith for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Stephanie Mackara can be reached by calling 843-763-4499.