



Form ADV Part 2B Brochure Supplement

October 11, 2023

Individuals covered by this supplement include:

Steven T. Bright
Joseph D. Schofield, III
Jeffrey K. Giguere, Jr.
Merriweather K. Mulé

Office Locations:

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Greenville, SC 29601
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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.

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 Office, 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, 2017-2022

Associate, Northwestern Mutual, 2016-2016

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

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