



Form ADV Part 2B Brochure Supplement

April 24, 2025

Individuals covered by this supplement include:

Michael R. Beck
Michael H. Kane
Leslie J. Reynoso
David P. Gurun
Matthew C. Thompson
Alexander W. Pierce

Bryan C. Jackson
Emerald E. Ward
Kevin R. Tehan
Keith A. Ferguson, Jr.
Peter Curtis

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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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MICHAEL R. BECK

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael R. Beck, Partner, Managing Director, b. 1959

Education:

BA, Economics and Business Administration, Vanderbilt University

Business Background:

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

Managing Director, Portfolio Manager, Wealthstreet Investment Advisors, LLC, 2017-2021

Executive Vice President, Portfolio Manager, Marketing Manager, Gerald L. Ray & Associates, Ltd., 1999-2017

ITEM 3 - DISCIPLINARY INFORMATION

Michael Beck has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Michael Beck's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC.

ITEM 6 – SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Michael Beck oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX (Suite 1150), 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 Michael Beck. She can be reached by calling 949-718-1600.

MICHAEL H. KANE, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael H. Kane, CFA, Partner, Managing Director, b. 1964

Education:

MBA, Southern Methodist University
BS, Finance, Babson College

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present
Managing Director, Portfolio Manager, Wealthstreet Investment Advisors, LLC, 2017-2021
Executive Vice President, Gerald L. Ray & Associates, Ltd., 2009-2017

Professional Designations

Michael Kane holds the following professional designation:

Chartered Financial Analyst

The Chartered Financial Analyst (“CFA”) designation is sponsored by CFA Institute. To earn a CFA charter, candidates must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The three proctored course exams correspond to three 250-hour self-study levels. Completing the Program takes most candidates between two and five years. More information regarding the CFA is available at <https://www.cfainstitute.org/>

ITEM 3 - DISCIPLINARY INFORMATION

Michael Kane has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, Michael Kane serves as a member on the Investment Committee for the Dallas Jewish Community Foundation, and as a trustee on the Board of Trustees for Legacy Senior Communities. He receives no compensation from serving in this capacity. These other business activities account for less than 10% of Mr. Kane’s time.

ITEM 5 - ADDITIONAL COMPENSATION

Michael Kane’s compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC.

ITEM 6 – SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Michael Kane oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX (Suite 1150), 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 Michael Kane. She can be reached by calling 949-718-1600.

LESLIE J. REYNOSO, CFA, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Leslie J. Reynoso, CFA, CFP®, Partner, Senior Wealth Advisor, b. 1989

Education:

BBA, Finance, Southern Methodist University

BA, Spanish, Southern Methodist University

Business Background:

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

Wealth Management & 401(K) Advisor, Wealthstreet Investment Advisors, LLC, 2017-2021

Wealth Management & 401(K) Advisor Gerald L. Ray & Associates, Ltd., 2011-2017

Professional Designations

Leslie Reynoso holds the following professional designations:

Chartered Financial Analyst

The Chartered Financial Analyst (“CFA”) designation is sponsored by CFA Institute. To earn a CFA charter, candidates must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The three proctored course exams correspond to three 250-hour self-study levels. Completing the Program takes most candidates between two and five years. More information regarding the CFA is available at <https://www.cfainstitute.org/>

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

Leslie Reynoso has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Leslie Reynoso 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 and ownership of Beacon Pointe Advisors, LLC, Leslie Reynoso is eligible to receive variable compensation based on the number of clients/assets she brings into Beacon Pointe.

ITEM 6 – SUPERVISION

Michael Beck, Partner, Managing Director, is responsible for overseeing Leslie Reynoso’s activities. Michael Beck monitors the advice provided by Leslie Reynoso for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Michael Beck can be reached by calling 214-954-1900.

ALEXANDER W. PIERCE

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alexander W. Pierce, Partner, Senior Wealth Advisor, b. 1956

Education:

BBA, Finance, Southern Methodist University

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present

Portfolio Manager, Oxbow Advisors, LLC, 2011-2023

Registered Representative, Herndon Plant Oakley, LTD, 2010-2015

ITEM 3 - DISCIPLINARY INFORMATION

Alexander Pierce has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Alexander Pierce 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 his regular compensation and ownership of Beacon Pointe Advisors, LLC, Alexander Pierce is eligible to receive variable compensation based on the number of clients/assets he brings into Beacon Pointe.

ITEM 6 – SUPERVISION

Michael Beck, Partner, Managing Director, is responsible for overseeing Alexander Pierce's activities. Michael Beck monitors the advice provided by Alexander Pierce for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Michael Beck can be reached by calling 214-954-1900.

KEITH A. FERGUSON, JR., CFP®

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Keith “Allen” Ferguson, JR., CFP®, Partner, Senior Wealth Advisor, b. 1980

Education:

MBA, Finance, Baylor University, Hankamer School of Business
BA, Government, The University of Texas at Austin

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present
Agent, Beacon Pointe Insurance Services, LLC, 2022-Present
Associate Partner, Client Advisor, Benchmark Private Wealth Management, LLC, 2021-2022
Registered Representative, Innovation Partners LLC, 2021-2022
Investment Advisor Representative, Raymond James Financial Services Advisors, Inc., 2015-2021
Registered Representative, Wells Fargo Advisors Financial Network, LLC, 2012-2015

Professional Designations

Allen Ferguson holds the following professional designation:

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>

ITEM 3 – DISCIPLINARY INFORMATION

Allen Ferguson has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 5 – ADDITIONAL COMPENSATION

In addition to his regular compensation and ownership of Beacon Pointe Advisors, LLC, Allen Ferguson is eligible to receive variable compensation based on the number of clients/assets he brings into Beacon Pointe. The additional compensation that Allen Ferguson is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 – SUPERVISION

Michael Beck, Partner, Managing Director, is responsible for supervising Allen Ferguson’s activities. Michael Beck monitors the advice provided by Allen Ferguson for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Michael Beck can be reached by calling 214-954-1900.

BRYAN C. JACKSON, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Bryan C. Jackson, CFP®, Senior Wealth Advisor, b. 1974

Education:

BBS, Business Management, James Madison University

Business Background:

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

Registered Representative, Purshe Kaplan Sterling Investments, 2023-Present

Investment Advisor Representative, VisionPoint Advisory Group, 2016-2022

Registered Representative, LPL Financial, LLC, 2016-2022

Investment Advisor Representative, Harbor Capital Management, 2012-2016

Professional Designations

Bryan Jackson holds the following professional designation:

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>.

ITEM 3 - DISCIPLINARY INFORMATION

Bryan Jackson has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Bryan Jackson spends a portion of his time as a registered representative of Purshe Kaplan Sterling Investments, a non-affiliated registered broker-dealer. In this capacity, Bryan Jackson may make security recommendations, offer investment products and/or effect securities transactions. When effecting

transactions, he is eligible to receive compensation, commissions and/or trailing 12b-1 fees from Purshe Kaplan Sterling Investments for products held by BPA's advisory clients. Receipt of this type of transaction-related compensation is a conflict of interest as it gives Bryan Jackson an incentive to recommend investment products based on the additional compensation received. BPA will not charge advisory fees on the portion of the client's portfolio that includes investment products for which Bryan Jackson receives commissions and/or trailing 12b-1 fees. In all instances, BPA will ensure that BPA clients are provided with a disclosure that outlines the commissions and/or trailing 12b-1 fees that Bryan Jackson receives.

In addition to his role with Beacon Pointe Advisors, LLC, Bryan Jackson owns a consulting company entitled Ellison Christopher, LLC. He receives compensation as an employee benefits consultant specializing in health benefits. This other business activity accounts for less than 10% of Mr. Jackson's time.

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 – SUPERVISION

Michael Beck, Partner, Managing Director, is responsible for overseeing Bryan Jackson's activities. Michael Beck monitors the advice provided by Bryan Jackson for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Michael Beck can be reached by calling 214-954-1900.

EMERALD E. WARD, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Emerald E. Ward, CFP®, Senior Financial Planner, b. 1994

Education:

MS, Personal Financial Planning, Texas Tech University

Business Background:

Senior Financial Planner, Beacon Pointe Advisors, LLC, 2023-Present

Associate Financial Planner, SFMG Wealth Advisors, 2021-2023

Senior Financial Planner, Plancorp LLC, 2020-2021

Financial Planning Associate, Amicus Financial Advisors, 2019-2020

Planning Associate, Ameriprise Financial Services, 2017-2018

Professional Designations

Emerald Ward holds the following professional designation:

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>.

ITEM 3 - DISCIPLINARY INFORMATION

Emerald Ward has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Emerald Ward 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, Emerald Ward is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

Michael Beck, Partner, Managing Director, is responsible for overseeing Emerald Ward’s activities. Michael Beck monitors the advice provided by Emerald Ward for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Emerald Ward can be reached by calling 214-954-1900.

DAVID P. GURUN, CFP®, CFA, CPA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David P. Gurun, CFP®, CFA, CPA, Senior Wealth Advisor, b. 1958

Education:

BA, Accounting, Baylor University

Business Background:

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

Registered Representative, WhiteRock Wealth Management Co., 2012-2025

President, CIO, WhiteRock Wealth Management Co., 2012-2024

Investment Manager, Gurun Investment Advisors, Inc., 1995-2012

Portfolio Manager, AMR Investment Services Inc., 1989-1995

Professional Designations

David Gurun 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 Analyst

The Chartered Financial Analyst (“CFA”) designation is sponsored by CFA Institute. To earn a CFA charter, candidates must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The three proctored course exams correspond to three 250-hour self-study levels. Completing the Program takes most

candidates between two and five years. More information regarding the CFA is available at <https://www.cfainstitute.org/>

Certified Public Accountant

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

David Gurun has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

David Gurun 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 his regular compensation from Beacon Pointe Advisors, LLC, David Gurun is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 – SUPERVISION

As a Senior Wealth Advisor at Beacon Pointe Advisors, LLC, David Gurun oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX (Suite 925), 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 David Gurun. She can be reached by calling 949-718-1600

KEVIN R. TEHAN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kevin R. Tehan, Partner, Senior Wealth Advisor, b. 1990

Education:

BA, Economics, University of Texas at Dallas

Business Background:

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

Vice President, WhiteRock Wealth Management Co., 2016-2024

Process Server, Legal Document Management, 2009-2015

ITEM 3 - DISCIPLINARY INFORMATION

Kevin Tehan has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Kevin Tehan 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 his regular compensation and ownership of Beacon Pointe Advisors, LLC, Kevin Tehan is eligible to receive variable compensation based on the number of clients/assets he brings into Beacon Pointe.

ITEM 6 – SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Kevin Tehan oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX (Suite 925), 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 Kevin Tehan. She can be reached by calling 949-718-1600.

MATTHEW C. THOMPSON

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew C. Thompson, Principal, Wealth Advisor, b. 1982

Education:

BA, Real Estate Finance, Southern Methodist University

Business Background:

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

Wealth Manager, WhiteRock Wealth Management Co., 2021-2024

Real Estate Broker, Lee & Associates, LLC, 2015-2021

Real Estate Broker, Colliers International, 2004-2015

ITEM 3 - DISCIPLINARY INFORMATION

Matthew Thompson has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew Thompson 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 his regular compensation and ownership of Beacon Pointe Advisors, LLC, Matthew Thompson is eligible to receive variable compensation based on the number of clients/assets he brings into Beacon Pointe.

ITEM 6 – SUPERVISION

As a Principle, Wealth Advisor at Beacon Pointe Advisors, LLC, Matthew Thompson oversees the investment advice provided from Beacon Pointe Advisors' Dallas, TX (Suite 925), 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 Matthew Thompson. She can be reached by calling 949-718-1600.

PETER CURTIS, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Peter Curtis, CFP®, Wealth Advisor, b. 1989

Education:

MA, Public and International Affairs, University of Pittsburgh
BA, Government, Harvard College

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-2025
Associate Advisor, Greycourt & Co., Inc., 2020-2022

Professional Designations

Peter Curtis holds the following professional designation:

Certified Financial Planner (CFP®)

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ITEM 3 - DISCIPLINARY INFORMATION

Peter Curtis has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Peter Curtis 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 his regular compensation from Beacon Pointe Advisors, LLC, Peter Curtis is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Michael Beck, Partner, Managing Director, is responsible for supervising Peter Curtis' activities. Michael Beck monitors the advice provided by Peter Curtis for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Michael Beck can be reached by calling 214-954-1900.