



Form ADV Part 2B Brochure Supplement

August 8, 2023

Individuals covered by this supplement include:

Robert J. Comeaux
Walter A. Bond
Raymond A. Daigle
Megan O. Cochran
Doug A. Tillman

Mollie A. Taylor
Edward I. Blanchard
Brent J. Sheppard
Scott A. Schneider
Janic Hoyuela

Office Location:

3000 21st Street
Metairie, LA 70002
(504) 309-6911

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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ROBERT J. COMEAUX, AIF®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert J. Comeaux, AIF®, Partner, Managing Director, b. 1967

Education:

JD, Loyola School of Law
BA, Journalism, Louisiana State University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present
Agent, Beacon Pointe Insurance Services, LLC, 2020-Present
Registered Representative, Purshe Kaplan Sterling Investments, 2020-2022
Partner, CBD Wealth Management, 2004-2020
Advisor, Commonwealth Financial Network, 2015-2020

Professional Designations

Robert Comeaux holds the following professional designation:

Accredited Investment Fiduciary (“AIF”)

The AIF® designation is issued by the Center for Fiduciary Studies. To earn the designation, each AIF® candidate must complete either a web-based or capstone program, pass a final certification exam, and complete a minimum of 6 hours of continuing education per year. AIF® designees must also sign and agree to abide by a code of ethics. More information regarding the AIF® is available at <https://www.fi360.com/what-we-do/learning-development/aif-designation>.

ITEM 3 - DISCIPLINARY INFORMATION

Robert Comeaux has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

Robert Comeaux is also a Member of CBDQ, LLC, and a Co-Owner of Bayou Bucks, LLC, both entities are real estate holding companies. These other activities do not account for a meaningful portion of Mr. Comeaux’s time or income.

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 – SUPERVISION

As Partner, Managing Director, Robert Comeaux oversees the investment advice provided from Beacon Pointe Advisors, LLC's, Metairie, Louisiana 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 Robert Comeaux. She can be reached by calling 949-718-1600.

WALTER A. BOND, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Walter A. Bond, CFP®, Partner, Managing Director, b. 1967

Education:

JD, Louisiana State University, Paul M. Herbert Law Center
BS, Finance, Louisiana State University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present
Agent, Beacon Pointe Insurance Services, LLC, 2020-Present
Registered Representative, Purshe Kaplan Sterling Investments, 2020-2022
Partner, CBD Wealth Management, 2004-2020
Advisor, Commonwealth Financial Network, 2015-2020
Advisor, LPL Financial, LLC, 2004-2020

Professional Designations

Walter Bond 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

Walter Bond has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, Walter Bond 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

Walter Bond is eligible to receive a portion of these commissions. Clients pay separate fees for advisory services and insurance products or services. This practice gives Walter Bond 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 Walter Bond or BPIS if they decide to follow Mr. Bond's recommendations.

Walter Bond is also a Member of CBDQ, LLC, a real estate holding company. This activity does not account for a meaningful portion of Mr. Bond's time or income.

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 – SUPERVISION

As Partner, Managing Director, Walter Bond oversees the investment advice provided from Beacon Pointe Advisors, LLC's, Metairie, Louisiana 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 Walter Bond. She can be reached by calling 949-718-1600.

RAYMOND A. DAIGLE, AIF®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Raymond A. Daigle, AIF®, Partner, Managing Director, b. 1967

Education:

JD, Louisiana State University, Paul M. Herbert Law Center
BS, Finance, Louisiana State University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present
Agent, Beacon Pointe Insurance Services, LLC, 2020-Present
Registered Representative, Purshe Kaplan Sterling Investments, 2020-2022
Partner, CBD Wealth Management, 2004-2020
Advisor, Commonwealth Financial Network, 2015-2020
Advisor, LPL Financial, LLC, 2004-2020

Professional Designations

Raymond Daigle holds the following professional designation(s):

Accredited Investment Fiduciary (“AIF”)

The AIF® designation is issued by the Center for Fiduciary Studies. To earn the designation, each AIF® candidate must complete either a web-based or capstone program, pass a final certification exam, and complete a minimum of 6 hours of continuing education per year. AIF® designees must also sign and agree to abide by a code of ethics. More information regarding the AIF® is available at <https://www.fi360.com/what-we-do/learning-development/aif-designation>.

ITEM 3 - DISCIPLINARY INFORMATION

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

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

Raymond Daigle is also a Co-Owner of RAD Properties LLC and CBDQ, LLC, and a Manager of DDP, LLC, all real estate holding companies. These other activities do not account for a meaningful portion of Mr. Daigle's time or income.

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 – SUPERVISION

As Partner, Managing Director, Raymond Daigle oversees the investment advice provided from Beacon Pointe Advisors, LLC's, Metairie, Louisiana 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 Raymond Daigle. She can be reached by calling 949-718-1600.

MEGAN O. COCHRAN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Megan O. Cochran, Director of Firm Operations, Wealth Advisor, b. 1988

Education:

B.S., Finance and Economics, Louisiana State University

Business Background:

Director of Firm Operations, Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present

Director of Operations, Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2023

Agent, Beacon Pointe Insurance Services, LLC, 2020-2021

Licensed Staff, Commonwealth Financial Network, 2015-2020

Registered Representative, LPL Financial, 2013-2015

Mass Transfer, JP Morgan Securities LLC, 2012-2013

ITEM 3 - DISCIPLINARY INFORMATION

Megan Cochran has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Megan Cochran 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, Megan Cochran is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 - SUPERVISION

Robert Comeaux, Partner, Managing Director, is responsible for supervising Megan Cochran's activities. Robert Comeaux monitors the advice provided by Megan Cochran for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Robert Comeaux can be reached by calling 504-309-6911.

DOUG A. TILLMAN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Doug A. Tillman, Senior Wealth Advisor, b. 1973

Education:

MBA, University of New Orleans

BS, Accounting, University of New Orleans

Business Background:

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

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

Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2023

Advisor, CBD Wealth Management, 2016-2020

Advisor, Commonwealth Financial Network, 2016-2020

Senior Vice President, Dealer Funding, LLC, 2013-2014

ADT Holdings LLC/Tillman Capital Management, LLC, 2008-2016

ITEM 3 - DISCIPLINARY INFORMATION

Doug Tillman has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

Doug Tillman currently serves as President of the Christian Brothers Foundation Board. He is also Co-Owner and President of ADT Holdings, LLC, and Tillman Capital Management, LLC, both entities that previously conducted business consulting services and currently collect trailing fees from introductions made while Mr. Tillman was in an active role. These other activities do not account for a meaningful portion of Mr. Tillman’s time or income.

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 - SUPERVISION

Robert Comeaux, Partner, Managing Director, is responsible for supervising Doug Tillman's activities. Robert Comeaux monitors the advice provided by Doug Tillman for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Robert Comeaux can be reached by calling 504-309-6911.

MOLLIE B. TAYLOR, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mollie B. Taylor, CFP®, Wealth Advisor, b. 1988

Education:

BA, Economics, Loyola University

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present

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

Advisor, Commonwealth Financial Network, 2018-2020

Advisor, CBD Wealth Management, 2018-2020

Capital One Investing, 2015-2018

Professional Designations

Mollie Taylor 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

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

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role with Beacon Pointe Advisors, LLC, Mollie Taylor 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 Mollie Taylor is eligible to receive a portion of these commissions. Clients pay separate fees for advisory

services and insurance products or services. This practice gives Mollie Taylor 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 Mollie Taylor or BPIS if they decide to follow Ms. Taylor's recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Mollie Taylor'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. The additional compensation that Mollie Taylor is eligible to receive is outlined above in ***Item 4 – Other Business Activities***.

ITEM 6 - SUPERVISION

Robert Comeaux, Partner, Managing Director, is responsible for supervising Mollie Taylor's activities. Robert Comeaux monitors the advice provided by Mollie Taylor for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Robert Comeaux can be reached by calling 504-309-6911.

EDWARD “IAN” BLANCHARD, AIF®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Edward “Ian” Blanchard, AIF®, Senior Wealth Advisor, b. 1985

Education:

BA, Economics, Louisiana State University

Business Background:

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

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

Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2023

Advisor, Commonwealth Financial Network, 2015-2020

Financial Representative, CBD Wealth Management, 2015-2020

Advisor, LPL Financial LLC, 2011-2015

Professional Designations

Ian Blanchard holds the following professional designation:

Accredited Investment Fiduciary (“AIF”)

The AIF® designation is issued by the Center for Fiduciary Studies. To earn the designation, each AIF® candidate must complete either a web-based or capstone program, pass a final certification exam, and complete a minimum of 6 hours of continuing education per year. AIF® designees must also sign and agree to abide by a code of ethics. More information regarding the AIF® is available at <https://www.fi360.com/what-we-do/learning-development/aif-designation>.

ITEM 3 - DISCIPLINARY INFORMATION

Ian Blanchard has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 - SUPERVISION

Robert Comeaux, Partner, Managing Director, is responsible for supervising Ian Blanchard's activities. Robert Comeaux monitors the advice provided by Ian Blanchard for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Robert Comeaux can be reached by calling 504-309-6911.

BRENT J. SHEPPARD, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brent J. Sheppard, CFP®, Wealth Advisor, b. 1977

Education:

LL.M, Master of Laws, Taxation, Tax, Boston University School of Law
JD, Juris Doctor, Louisiana State University, Paul M. Herbert Law Center
BA, Economics, Louisiana State University

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present
Agent, Beacon Pointe Insurance Services, LLC, 2021-Present
Trust Officer and Wealth Advisor, Hancock Whitney, 2015-2021
Trust Officer, Capital One, 2008-2015

Professional Designations

Brent Sheppard 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

Brent Sheppard has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, Brent Sheppard 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 Brent Sheppard is eligible to receive a portion of these commissions. Clients pay separate fees for

advisory services and insurance products or services. This practice gives Brent Sheppard 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 Brent Sheppard or BPIS if they decide to follow Mr. Sheppard's recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Brent Sheppard'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 Brent Sheppard is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 - SUPERVISION

Raymond Daigle, Partner, Managing Director, is responsible for supervising Brent Sheppard's activities. Raymond Daigle monitors the advice provided by Brent Sheppard for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Raymond Daigle can be reached by calling 504-309-6911.

SCOTT A. SCHNEIDER, CFP®, CLU®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Scott A. Schneider, CFP®, CLU®, Wealth Advisor, b. 1983

Education:

BS, Business Management, University of New Orleans

Business Background:

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

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

Associate Agent, Michel M Legrand, Northwestern Mutual Investment Services, LLC, 2016-2022

Representative, Northwestern Mutual Wealth Management Company, 2016-2022

Registered Representative, Northwestern Mutual Investment Services, LLC, 2016-2022

Wealth Management Advisor, Northwestern Mutual Investment Services, LLC, 2016-2022

Wealth Management Advisor, TIAA-CREF, 2014-2016

Registered Representative, TIAA-CREF Individual & Institutional Services, LLC, 2014-2016

Representative, Northwestern Mutual Wealth Management Company, 2014-2014

Wealth Management Advisor, Northwestern Mutual Investment Services, LLC, 2011-2014

Professional Designations

Scott Schneider 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 Life Underwriter

The CLU designation is conferred by The American College. To earn the credential, each CLU candidate must take a proctored exam for each course of study, have 3 years of full-time business experience within the five years preceding the awarding of the designation, and complete a minimum of 30 hours of

continuing education every two years. More information regarding the CLU can be found at <http://www.cluhigheststandard.com/>.

ITEM 3 - DISCIPLINARY INFORMATION

Scott Schneider has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

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

ITEM 6 - SUPERVISION

Raymond Daigle, Partner, Managing Director, is responsible for supervising Scott Schneider’s activities. Raymond Daigle monitors the advice provided by Scott Schneider for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Raymond Daigle can be reached by calling 504-309-6911.

JANIC HOYUELA, CPFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Janic Hoyuela, CPFA®, Wealth Advisor, b. 1983

Education:

BS, Finance and International Business, Loyola University New Orleans

Business Background:

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

Relationship Manager, The Standard (Standard Retirement Services), 2016-2023

Financial Advisor, Edward Jones, 2013-2016

Professional Designations

Janic Hoyuela holds the following professional designation:

Certified Plan Fiduciary Advisor (CPFA®)

The Certified Plan Fiduciary Advisor (CPFA®) credential is issued by the National Association of Plan Advisors. The CPFA® was developed by some of the nation's leading advisors and retirement plan experts and demonstrates those with knowledge, expertise, and commitment to working with retirement plans. Financial advisors who earn their CPFA® designation demonstrate the expertise required to act as a plan fiduciary or help 401(k) plan fiduciaries manage their roles and responsibilities. More information about the CPFA® is available at <https://napacpfa.org/>.

ITEM 3 - DISCIPLINARY INFORMATION

Janic Hoyuela has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Janic Hoyuela 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, Janic Hoyuela is eligible to receive variable compensation based on the number of assets/clients he brings into Beacon Pointe.

ITEM 6 - SUPERVISION

Raymond Daigle, Partner, Managing Director, is responsible for supervising Janic Hoyuela's activities. Raymond Daigle monitors the advice provided by Janic Hoyuela for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Raymond Daigle can be reached by calling 504-309-6911.