



## Form ADV Part 2B Brochure Supplement

August 25, 2023

### Individuals covered by this supplement include:

Mark D. Flint  
Alex R. Nunes  
Michael S. Bakos  
Philip C. Hagopian

#### Located At:

11622 El Camino Real, Suite 100  
San Diego, CA 92130  
858-766-6524

#### 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](http://www.adviserinfo.sec.gov)

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# MARK D. FLINT, CFA

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Mark D. Flint, CFA**, Partner, Managing Director, b. 1971

*Education:*

MBA, International Finance, University of San Diego

BA, International Relations and Affairs, University of San Diego

*Business Background:*

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

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2016-2021

Agent, Beacon Pointe Insurance Services, LLC, 2016-Present

### Professional Designations

Mark Flint 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

Mark Flint has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Mark Flint’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.

## **ITEM 6 – SUPERVISION**

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Mark Flint oversees the investment advice provided from Beacon Pointe Advisors San Diego, CA 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 Mark Flint. She can be reached by calling 949-718-1600.

# ALEX R. NUNES, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alex R. Nunes, CFP®, Senior Wealth Advisor, b. 1980

### *Education:*

MS, Homeland Security, San Diego State University  
BS, Psychology, University of California, Santa Barbara

### *Business Background:*

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present  
Wealth Advisor, Beacon Pointe Advisors, LLC, 2019-2021  
Agent, Beacon Pointe Insurance Services, LLC, 2019-Present  
Financial Advisor, 20/20 Capital Management, Inc., 2016-2019  
Agent, 20/20 Financial Advisers, Inc., 2014-2019  
Registered Representative, Ameritas Investment Corp., 2014-2017

## Professional Designations

Alex Nunes 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

Alex Nunes has no material disciplinary history requiring disclosure under this item. Please see [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) for additional information about Alex Nunes.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, Alex Nunes is a licensed insurance agent for Beacon Pointe Insurance Services, LLC (“BPIS”). Beacon Pointe is affiliated with BPIS. BPIS is a licensed insurance agency. BPIS receives commissions on insurance products client purchase, and Alex Nunes is eligible to receive a portion of these commissions. Clients pay separate fees for advisory services and insurance products or services. This practice gives Alex Nunes 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 Alex Nunes or BPIS if they decide to follow Mr. Nunes’ recommendations.

## ITEM 5 - ADDITIONAL COMPENSATION

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

## ITEM 6 - SUPERVISION

Mark Flint, Partner, Managing Director,, is responsible for supervising Alex Nunes’ activities. Mark Flint monitors the advice provided by Alex Nunes for consistency with client objectives and Beacon Pointe Advisors, LLC’s policies. Mark Flint can be reached by calling 858-766-6524.

# PHILIP C. HAGOPIAN, AWMA™

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Philip C. Hagopian, AWMA™**, Wealth Advisor, b. 1979

*Education:*

BSBA, Finance, Northeastern University

*Business Background:*

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

Investment Advisor Representative, Westmount Asset Management, LLC 2021-2023

Vice President, Wealth Advisor, Lido Advisors, LLC, 2021

Registered Representative, Investment Advisor, Centaurus Financial, INC., 2020-2021

Registered Representative, The Leaders Group, INC., 2019-2020

Hybrid Marketer, The Annuity Store (TruChoice), 2013-2020

Investment Adviser Representative, Questar Asset Management, 2015-2019

## Professional Designations

Philip Hagopian holds the following professional designation:

*Accredited Wealth Management Advisor (AWMA™)*

The Accredited Wealth Management Advisor, or AWMA™ program, is issued by the College for Financial Planning – a Kaplan Company. The program is designated for advisors who want to better address the unique needs of high net worth clients. The program's one-of-a-kind curriculum contains sections dedicated to behavioral finance, working with small business owners, and succession/exit planning. Individuals who hold the AWMA™ designation have completed a course of study encompassing wealth strategies, equity based compensation plans, tax reduction alternatives, and asset protection alternatives. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. More information about the AWMA™ is available at <https://www.kaplanfinancial.com/wealth-management/awma>.

## ITEM 3 - DISCIPLINARY INFORMATION

Philip Hagopian has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## **ITEM 6 - SUPERVISION**

Mark Flint, Partner, Managing Director, is responsible for supervising Philip Hagopian's activities. Mark Flint monitors the advice provided by Philip Hagopian for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Mark Flint can be reached by calling 858-766-6524.



# MICHAEL S. BAKOS

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Michael S. Bakos**, Regional Director, b. 1974

*Education:*

BA, Finance, Governors State University College of Business

*Business Background:*

Regional Director, Beacon Pointe Advisors, LLC, 2021-Present

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

Vice President, Wealth Management Advisor, First American Trust, 2020-2021

Senior Vice President, Investment Adviser Representative, Alpha Cubed Investments., 2018-2020

Vice President, Financial Consultant, Fidelity Investments, 2007-2018

## ITEM 3 - DISCIPLINARY INFORMATION

Michael Bakos has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael Bakos 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 Bakos' 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.

## ITEM 6 - SUPERVISION

Mark Flint, Partner, Managing Director, is responsible for supervising Philip Hagopian's activities. Mark Flint monitors the advise provided by Philip Hagopian for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Mark Flint can be reached by calling 858-766-6524.