



Form ADV Part 2B Brochure Supplement

September 25, 2024

Individuals covered by this supplement include:

Mark D. Flint
Robert H. Ingham
Alex R. Nunes
Michael S. Bakos
Philip C. Hagopian
Austin Cassidy

Located At:

12750 High Bluff Drive, Suite 460
San Diego, CA 92130
858-766-6524

3131 Camino Del Rio North, Suite 370
San Diego, CA 92108
619-906-4499

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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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, 2016-2023

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.

ROBERT H. INGHAM, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert H. Ingham, CFP®, Partner, Senior Wealth Advisor, b. 1960

Education:

MBA, Finance, San Diego State University
BS, Management, University of Massachusetts

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Agent, Beacon Pointe Insurance Services, LLC, 2023-Present
Investment Adviser Representative, Ingham Wealth Management, 2008-Present
Registered Representative, Arete Wealth Management LLC, 2018-Present
Registered Representative, Purshe Kaplan Sterling Investments, 2011-2018

Professional Designations

Robert Ingham 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

Robert Ingham has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, Robert Ingham 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 Robert Ingham 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 Ingham 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 Ingham or BPIS if they decide to follow Mr. Ingham's recommendations.

Robert Ingham spends a portion of his time as a registered representative of Arete Wealth Management, LLC. In this capacity, Robert Ingham 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 Arete Wealth Management for products held by BPA's advisory clients. Receipt of this type of transaction-related compensation is a conflict of interest as it gives Robert Ingham 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 Robert Ingham 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 Robert Ingham receives.

Robert Ingham is also an Investment Adviser Representative (IAR) with Ingham Wealth Management, Inc. (IWM). IWM is a registered investment adviser with the Securities and Exchange Commission (SEC). In December 2023, IWM was acquired by Beacon Pointe Advisors, LLC. Mr. Ingham will temporarily maintain his IAR registration to transition any remaining advisory business under IWM. The time he spends on activities related to IWM is minimal.

ITEM 5 - ADDITIONAL COMPENSATION

Robert Ingham's compensation comes from his regular salary and ownership of Beacon Pointe Advisors, LLC. The additional compensation that Robert Ingham 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 Robert Ingham's activities. Mark Flint monitors the advice provided by Robert Ingham for consistency with client objectives and Beacon Pointe Advisors, LLC's policies. Mark Flint can be reached by calling 858-766-6524.

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

Professional Designations

Alex Nunes 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

Alex Nunes has no material disciplinary history requiring disclosure under this item. Please see 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.

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, 2021-2023

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 Michael Bakos' activities. Mark Flint monitors the advice provided by Michael Bakos 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 AdvisorSM (AWMA®)

The Accredited Wealth Management AdvisorSM, 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.

AUSTIN CASSIDY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Austin Cassidy, CFP®, Financial Planner, b. 1996

Education:

BS, Finance, Penn State University

Business Background:

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

Methodology Analyst, Vanguard, 2019-2024

Finance Intern, Vanguard, 2018

Professional Designations

Austin Cassidy 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

Austin Cassidy has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Austin Cassidy 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, Austin Cassidy is eligible to receive compensation for referring new clients to Beacon Pointe.

ITEM 6 - SUPERVISION

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