



Form ADV Part 2B Brochure Supplement

February 2026

Individuals covered by this supplement include:

Heather R. Schaber
Michael A. Dubis

www.beaconpointe.com

Office Location:

8383 Greenway Boulevard, Suite 600
Middleton, WI 53562
414-257-4248

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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HEATHER R. SCHABER

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Heather R. Schaber, Senior Client Service Associate, b. 1982

Education:

AAB, Business Management, Eastern Gateway Community College

Business Background:

Senior Client Service Associate, Beacon Pointe Advisors, LLC, 2022-Present

House Manager, Aoy Mitchell, 2016-2022

ITEM 3 - DISCIPLINARY INFORMATION

Heather Schaber has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Heather Schaber is a salaried employee of Beacon Pointe Advisors, LLC, and does not receive compensation based on client assets or advisory fees. However, she is eligible to receive a one-time referral bonus based on a percentage of the estimated first-year revenue generated from new clients she refers to the firm. Ms. Schaber does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients.

ITEM 6 - SUPERVISION

Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements.

David Massart, Partner, Managing Director, is generally responsible for supervising Heather Schaber's day-to-day advisory activities. Mr. Massart can be reached by calling 414-257-4248.

MICHAEL A. DUBIS, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael A. Dubis, CFP®, Partner, Managing Director, b. 1977

Education:

BBA, Real Estate and Urban Economics, University of Wisconsin

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2025-Present

President, Owner, Michel Dubis Financial Planning, 2006-2025

Professional Designations

Michael Dubis holds the following professional designation:

Certified Financial Planner (CFP®)

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 the 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 about the CFP® is available at <http://www.cfp.net/default.asp>.

ITEM 3 - DISCIPLINARY INFORMATION

Michael Dubis has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael Dubis 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 Dubis is a partner of Beacon Pointe Advisors, LLC, and is compensated by the firm with a salary and variable compensation based on client assets under management. Michael Dubis is an equity owner in the parent company of the firm. Mr. Dubis does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, Michael Dubis oversees the investment advisory services provided by Beacon Pointe Advisors' Middleton, Wisconsin office. He is not subject to day-to-day supervision by another individual. However, Beacon Pointe supervises its personnel in accordance with its Code of Ethics and written compliance policies and procedures. The firm's compliance team oversees compliance with these policies and conducts periodic reviews of advisory activities, including client communications and investment recommendations, to help ensure compliance with applicable regulatory requirements and firm policies.

Questions regarding the firm's compliance program can be directed to Shannon Eusey, Chief Executive Officer, and Chief Compliance Officer, at 949-718-1600.