



# Form ADV Part 2B Brochure Supplement

March 2026

[www.beaconpointe.com](http://www.beaconpointe.com)

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This brochure supplement provides information about the individuals listed in the Table of Contents who are supervised persons of Beacon Pointe Advisors, LLC. 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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# CHRISTOPHER C. PHILLIPS, CEPA®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Christopher Phillips, CEPA®**, Partner, Senior Wealth Advisor, b. 1989

*Education:*

BA, International Business, Whittier College

*Business Background:*

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

Senior Portfolio Manager, BNY Mellon, 2018-2024

### Professional Designations

Christopher Phillips holds the following professional designation:

*Certified Exit Planning Advisor, (CEPA®)*

The Certified Exit Planning Advisor (CEPA®) designation is awarded by the Exit Planning Institute. The candidate must complete a five-day MBA style program that concludes with a proctored exam. Candidates must also meet all the following requirements:

- Five years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business-broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity.
- Undergraduate degree from a qualifying institution; if no qualifying degree candidate must submit additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies).
- Continuing Education: To retain the CEPA designation the designee must obtain 40 hours of Continuing Education ("CE") every three years and remain in good standing with Exit Planning Institute.

More information is available at [The Exit Planning Institute](#)

## ITEM 3 - DISCIPLINARY INFORMATION

Christopher Phillips has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Christopher Phillips 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. Christopher Phillips is an equity owner in the parent company of the firm. Mr. Phillips 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Christopher Phillips' day-to-day advisory activities. Ms. Yuill can be reached by calling 310-488-7868.

# DAVID M. SZABLA, CFP®, CRPC®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David M. Szabla, CFP®, CRPC®, Wealth Advisor, b. 1991

### *Education:*

BA, History, Spanish, University of Washington

### *Business Background:*

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

Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-2024

Financial Solutions Advisor, Merrill Lynch, Pierce, Fenner & Smith, Inc., 2016-2021

Financial Solutions Advisor, Bank of America, N.A, 2016-2021

## Professional Designations

David Szabla holds the following professional designations:

### *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>.

### *Chartered Retirement Planning Counselor (CRPC®)*

The Chartered Retirement Planning Counselor (CRPC®) designation is a retirement planning credential awarded by the College for Financial Planning® to individuals who meet its educational, examination and ethical requirements. To earn a CRPC® designation, candidates are required to have completed the CRPC® Designation Program, a self-taught educational program focused on various pre- and post- retirement needs of individuals. Recipients are further required to have successfully passed a multiple-choice examination addressing a range of retirement-related matters, such as estate planning and asset management. On an ongoing basis, CRPC® designees are also required to affirm their adherence to the

applicable Code of Ethics and complete at least 16 hours of continuing education every two years. More information about the CRPC is available at <https://www.cffp.edu/>.

### **ITEM 3 - DISCIPLINARY INFORMATION**

David Szabla has no disciplinary history to disclose.

### **ITEM 4 - OTHER BUSINESS ACTIVITIES**

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

### **ITEM 5 - ADDITIONAL COMPENSATION**

David Szabla's compensation comes from Beacon Pointe Advisors, LLC. He receives a salary and variable compensation that is based on the assets under management in the client accounts he services. Mr. Szabla 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising David Szabla's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-488-7868.

# INDYA M. YUILL

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Indya M. Yuill**, Partner, Managing Director, b. 1986

*Education:*

BS, Business Administration, Finance, University of Southern California Marshall School of Business

*Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present

Partner, Managing Director, Beacon Pointe Wealth Advisors, LLC, 2019-2020

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2019-2020

## ITEM 3 - DISCIPLINARY INFORMATION

Indya Yuill has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Indya Yuill 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. Indya Yuill is an equity owner in the parent company of the firm. Ms. Yuill 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, Indya Yuill oversees the investment advisory services provided by Beacon Pointe Advisors' Los Angeles, California office. She 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.

# **JULIA M. CUMMINGS**

## **ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Julia M. Cummings**, Senior Wealth Advisor, b. 1987

*Education:*

BA, Anthropology, Amherst College

*Business Background:*

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

Senior Wealth Advisor, Beacon Pointe Wealth Advisors, LLC, 2018-2020

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2018-2020

## **ITEM 3 - DISCIPLINARY INFORMATION**

Julia Cummings has no disciplinary history to disclose.

## **ITEM 4 - OTHER BUSINESS ACTIVITIES**

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Julia Cummings' compensation comes from Beacon Pointe Advisors, LLC. She receives a salary and variable compensation that is based on the assets under management in the client accounts she services. Ms. Cummings 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Julia Cummings' day-to-day advisory activities. Ms. Yuill can be reached by calling 310-488-7868.

# MATTHEW D. MACDONALD, CFA®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Matthew D. MacDonald, CFA®**, Senior Wealth Advisor, b. 1979

*Education:*

BCom, Commerce, Finance, University of British Columbia Sauder School of Business

*Business Background:*

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

Registered Representative, Wells Fargo Clearing Services, LLC, 2018-2021

Wealth Advisor, Wells Fargo Bank, 2018-2021

### Professional Designations

Matthew MacDonald holds the following professional designation:

*Chartered Financial Analyst (CFA®)*

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

Matthew MacDonald has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Matthew MacDonald’s compensation comes from Beacon Pointe Advisors, LLC. He receives a salary and variable compensation that is based on the assets under management in the client accounts he services. Mr. MacDonald 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Matthew MacDonald's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-488-7868.

# TRENTON B. JOLLY, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Trenton B. Jolly, CFP®, Wealth Advisor, b. 1996

*Education:*

BA, Economics, University of California, Los Angeles

*Business Background:*

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

Investment Adviser Representative, Beacon Pointe Advisors, LLC, 2019-Present

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2024

Associate Wealth Advisor, Beacon Pointe Wealth Advisors, LLC, 2019-2020

### Professional Designations

Trenton Jolly 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

Trenton Jolly has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Trenton Jolly's compensation comes from Beacon Pointe Advisors, LLC. He receives a salary and variable compensation that is based on the assets under management in the client accounts he services. Mr. Jolly 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Trenton Jolly's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-488-7868.

# WILLIAM G. BLACKARD

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**William G. Blackard**, Associate Wealth Advisor, b. 1997

*Education:*

MBA, University of Florida

BS, Business Administration, University of North Carolina

*Business Background:*

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

Senior Revenue Growth Manager, Reynolds American Inc., 2033-2024

Lead Revenue Growth Manager, Reynolds American Inc., 2021-2023

Global Graduate – Trade Marketing, Reynolds American Inc., 2021-2021

Global Graduate – Brand Marketing, Reynolds American Inc., 2020-2021

## ITEM 3 - DISCIPLINARY INFORMATION

William Blackard has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

William Blackard is a salaried employee of Beacon Pointe Advisors, LLC, and does not receive compensation based on client assets or advisory fees. However, he is eligible to receive a one-time referral bonus based on a percentage of the estimated first-year revenue generated from new clients he refers to the firm. Mr. Blackard 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising William Blackard's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-488-7868.