



Form ADV Part 2B Brochure Supplement

March 2026

Individuals covered by this supplement include:

Bernard P. McGloin
Colin J. Rowe
David M. Emmes II

www.beaconpointe.com

Office Location:

610 Newport Center Drive, Suite 830
Newport Beach, CA 92660
949-718-4527

Corporate Office:

24 Corporate Plaza Drive, Suite 150
Newport Beach, CA 92660

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

Table of Contents

<i>BERNARD P. MCGLOIN, CFA®</i>	3
<i>COLIN J. ROWE</i>	5
<i>DAVID M. EMMES II</i>	6

BERNARD P. MCGLOIN, CFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Bernard P. McGloin, CFA®, Partner, Managing Director, b. 1977

Education:

BBS, Business Studies, Dublin City University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2023-Present

Managing Director, BNY Mellon Wealth Management, 2003-2023

Professional Designation

Bernard McGloin 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

Bernard McGloin has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Bernard McGloin 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. Bernard McGloin is an equity owner in the parent company of the firm. Mr. McGloin 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, Bernard McGloin oversees the investment advisory services provided by Beacon Pointe Advisors' Newport Beach, California 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.

Shannon Eusey, Chief Executive Officer and Chief Compliance Officer, is the supervisor of Bernard McGloin. She can be reached by calling 949-718-1600.

COLIN J. ROWE

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Colin J. Rowe, Relationship Manager, b. 1998

Education:

MBA, Finance, Entrepreneurship, University of Arizona

BS, Business Management, University of Arizona

Business Background:

Relationship Manager, Beacon Pointe Advisors, LLC, 2025-Present

Registered Representative, Charles Schwab & Co., Inc., 2022-2025

Loan Officer, Reduce Mortgage, 2021-2022

First Flyer, Sales, Freedom Mortgage, 2020-2021

ITEM 3 - DISCIPLINARY INFORMATION

Colin Rowe has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Colin Rowe 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. Rowe 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.

Lauren Meixel, Director of Operations, Wealth Advisor, is generally responsible for supervising Colin Rowe's day-to-day advisory activities. Ms. Meixel can be reached by calling 949-720-9980.

DAVID M. EMMES II

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David M. Emmes II, Partner, Managing Director, b. 1960

Education:

MBA, Master of Business Administration, California State University, Long Beach
BS, Business Administration & Finance, California State University, Long Beach

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present
Managing Partner & Investment Advisor, Pacific Edge Advisors, LLC, 2016-2021

ITEM 3 - DISCIPLINARY INFORMATION

David Emmes has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to David Emmes' role with Beacon Pointe Advisors, LLC, he serves as a trustee for the Orange County Museum of Art ("OCMA"). This activity accounts for a de minimis amount of David Emmes' time and income. This activity is unrelated to Beacon Pointe Advisors, LLC's advisory business. Beacon Pointe does not believe it presents a conflict of interest. In his capacity as a trustee, he attends regularly scheduled Board meetings, chairs or participates in Board committees, and provides oversight and guidance to museum staff.

ITEM 5 - ADDITIONAL COMPENSATION

David Emmes 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. David Emmes is an equity owner in the parent company of the firm. Mr. Emmes does not receive economic benefit from any person or entity other than Beacon Pointe Advisors, LLC, in connection with providing investment advice to clients. The additional compensation that David Emmes is eligible to receive is outlined above in **Item 4 – Other Business Activities**.

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, David Emmes oversees the investment advisory services provided by Beacon Pointe Advisors' Newport Beach, California 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.

Shannon Eusey, Chief Executive Officer and Chief Compliance Officer, is the supervisor of David Emmes. She can be reached by calling 949-718-1600.