



Form ADV Part 2B Brochure Supplement

March 2026

Individuals covered by this supplement include:

Evan C. Davies
Thomas M. Behr

www.beaconpointe.com

Office Location:

8900 Keystone Crossing, Suite 610
Indianapolis, IN 46240
317-218-3848

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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EVAN C. DAVIES

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Evan C. Davies, Associate Wealth Advisor, b. 1992

Education:

BS, Finance & International Studies, Indiana University

Business Background:

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present

Agent, Beacon Pointe Insurance Services, LLC, 2025-Present

General Manager, Smoothie King, 2025-2025

Licensed Specialist, Charles Schwab, 2025-2025

Investment Advisor Representative, Impact Legacy Retirement Group RIA, LLC, 2024-2025

Snow Plow Driver, Camelot Property Services, 2024-2025

Financial Advisor, Western & Southern Financial Group, 2024-2024

Financial Advisor, Prudential, 2022-2024

Paraplanner, Wealthcare Partners, 2022-2022

Senior Business Analyst, Infosys LTD, 2019-2021

ITEM 3 – DISCIPLINARY INFORMATION

Evan Davies has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC ("BPA"), Evan Davies is a licensed insurance agent for Beacon Pointe Insurance Services, LLC ("BPIS"), a California-licensed insurance agency, under common ownership with BPA. BPIS receives commissions on insurance products clients purchase, and Evan Davies may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Evan Davies may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Evan Davies to recommend insurance products based on the compensation received, rather than focusing solely on the client's needs. Clients are not obligated to act on any insurance recommendations or conduct transactions through Evan Davies or BPIS if they follow Mr. Davies' recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Evan Davies 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. Davies 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 Evan Davies is eligible to receive is outlined above in ***Item 4 – Other Business Activities***.

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.

Thomas Behr, Managing Director, is generally responsible for supervising Evan Davies’ day-to-day advisory activities. Mr. Behr can be reached by calling 317-218-3848.

THOMAS M. BEHR, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Thomas M. Behr, CFP®, Managing Director, b. 1971

Education:

BA, Philosophy, St. John's University

Business Background:

Managing Director, Beacon Pointe Advisors, LLC, 2024-Present

Agent, Beacon Pointe Insurance Services, LLC, 2024-Present

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-2024

Market President, First Western Trust Bank, 2004-2023

Registered Representative, Lion Street Financial, LLC, 2015-2023

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>.

ITEM 3 - DISCIPLINARY INFORMATION

Thomas Behr has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC (“BPA”), Thomas Behr is a licensed insurance agent for Beacon Pointe Insurance Services, LLC (“BPIS”), a California-licensed insurance agency, under common ownership with BPA. BPIS receives commissions on insurance products clients purchase, and Thomas Behr may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Thomas Behr may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Thomas Behr to recommend insurance products based on the compensation received, rather than focusing solely on the client's needs. Clients are not obligated to act on any insurance recommendations or conduct transactions through Thomas Behr or BPIS if they Mr. Behr's recommendations.

ITEM 5 - ADDITIONAL COMPENSATION

Thomas Behr'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. Behr 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 Thomas Behr is eligible to receive is outlined above in *Item 4 – Other Business Activities*.

ITEM 6 - SUPERVISION

As a Managing Director at Beacon Pointe Advisors, LLC, Thomas Behr oversees the investment advisory services provided by Beacon Pointe Advisors' Indianapolis, Indiana 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.