



## Form ADV Part 2B Brochure Supplement

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

**Office Location:**

5960 Berkshire Lane, Suite 1175  
Dallas, TX 75225  
214-387-2559

**Corporate Office:**

24 Corporate Plaza Drive, Suite 150  
Newport Beach, CA 92660  
949-718-1600

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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# COLE H. HELTON

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Cole H. Helton**, Associate Wealth Advisor, b. 2002

*Education:*

BBA, Finance, Baylor University

BBA, Accounting, Baylor University

*Business Background:*

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

Analyst, The New Amsterdam Group, 2024-2025

Tutor, Baylor University, 2024-2025

Student, Baylor University, 2023-2025

Assistant Coach, Warrior Way, 2023-2024

Student, McLennan Community College, 2022-2023

Student, Texas Tech University, 2020-2021

## ITEM 3 - DISCIPLINARY INFORMATION

Cole Helton has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Cole Helton 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. Helton 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.

Pierce Halsted, Senior Associate Wealth Advisor, is generally responsible for supervising Cole Helton's day-to-day advisory activities. Mr. Halsted can be reached by calling 214-387-2559.

# **JULIE M. ANDERSON**

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

Julie M. Anderson, Senior Relationship Manager, b. 1980

*Education:*

BBA, Finance, University of Texas

*Business Background:*

Senior Relationship Manager, Beacon Pointe Advisors, LLC, 2023-Present  
Registered Client Service Associate, UBS Financial Services Inc., 2011-2023

## **ITEM 3 – DISCIPLINARY INFORMATION**

Julie Anderson has no disciplinary history to disclose.

## **ITEM 4 – OTHER BUSINESS ACTIVITIES**

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

## **ITEM 5 – ADDITIONAL COMPENSATION**

Julie Anderson 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. Anderson 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.

William Diehl, Partner, Managing Director, is generally responsible for supervising Julie Anderson's day-to-day advisory activities. Mr. Diehl can be reached by calling 214-387-2559.

# LINDSEY R. CROW

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Lindsey R. Crow**, Partner, Managing Director, b. 1966

*Education:*

MBA, Arizona State University

BA, University of Arkansas

MIM, Thunderbird School of Global Management

*Business Background:*

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

Agent, Beacon Pointe Insurance Services, LLC, 2023-Present

Financial Advisor, UBS Financial Services Inc., 2009-2023

## ITEM 3 - DISCIPLINARY INFORMATION

Lindsey Crow has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC ("BPA"), Lindsey Crow 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 Lindsey Crow may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, Lindsey Crow may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for Lindsey Crow 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 Lindsey Crow or BPIS if they follow Mr. Crow's recommendations.

In addition to Lindsey Crow's role with Beacon Pointe Advisors, LLC, he serves as a secretary for Cedar Families, LLC. This activity accounts for a de minimis amount of Lindsey Crow's time and income. This activity is unrelated to Beacon Pointe Advisors, LLC's advisory business. Beacon Pointe Advisors, LLC does not believe it presents a conflict of interest

## ITEM 5 – ADDITIONAL COMPENSATION

Lindsey Crow 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. Lindsey Crow is an equity owner in the parent company of the firm. Mr. Crow 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 Lindsey Crow 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, Lindsey Crow oversees the investment advisory services provided by Beacon Pointe Advisors' Dallas, Texas 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 Lindsey Crow. She can be reached by calling 949-718-1600.

# PIERCE J. HALSTED, CFA®

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Pierce J. Halsted, CFA®, Senior Associate Wealth Advisor, b. 1997

*Education:*

BBA, Finance and Economics, Baylor University

*Business Background:*

Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present

Client Service Associate, UBS Financial Services Inc., 2019-2023

### Professional Designations

Pierce Halsted 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

Pierce Halsted has no disciplinary history to disclose.

## ITEM 4 – OTHER BUSINESS ACTIVITIES

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

## ITEM 5 – ADDITIONAL COMPENSATION

Pierce Halsted 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. Halsted 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.

William Diehl, Partner, Managing Director, is generally responsible for supervising Pierce Halsted’s day-to-day advisory activities. Mr. Diehl can be reached by calling 214-387-2559.

# **SANDREA “JOYCE” CRIVELLARI, JD**

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

**Sandra “Joyce” Crivellari, JD**, Senior Estate Strategist, b. 1965

*Education:*

JD, St. Mary’s University School of Law  
BS, Secondary Education, Texas Christian University

*Business Background:*

Senior Estate Strategist, Beacon Pointe Advisors, LLC, 2025-Present  
Senior Wealth Strategist, UBS Financial Services, Inc, 2008-2025

## **ITEM 3 – DISCIPLINARY INFORMATION**

Joyce Crivellari has no disciplinary history to disclose.

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

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Joyce Crivellari’s 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. Crivellari 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.

Matthew Cooper, President, is generally responsible for supervising Joyce Crivellari’s day-to-day advisory activities. Mr. Cooper can be reached by calling 949-718-1600.

# **SARAH R. STUBBS**

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

Sarah R. Stubbs, Associate Wealth Advisor, b. 1991

*Education:*

BBS, Business, San Jose State University

*Business Background:*

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present

Wealth Strategy Associate, UBS Financial Services Inc., 2018-2023

## **ITEM 3 – DISCIPLINARY INFORMATION**

Sarah Stubbs has no disciplinary history to disclose.

## **ITEM 4 – OTHER BUSINESS ACTIVITIES**

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

## **ITEM 5 – ADDITIONAL COMPENSATION**

Sarah Stubbs 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. Stubbs 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.

William Diehl, Partner, Managing Director, is generally responsible for supervising Sarah Stubb's day-to-day advisory activities. Mr. Diehl can be reached by calling 214-387-2559.

# WILLIAM W. DIEHL, CFA®

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William W. Diehl, CFA®, Partner, Managing Director, b. 1970

### *Education:*

MBA, Business Administration, University of Texas  
BA, Engineering and Math, Vanderbilt University

### *Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2023-Present  
Agent, Beacon Pointe Insurance Services, LLC, 2023-Present  
Financial Advisor, UBS Financial Services Inc., 2009-2023

## Professional Designations

William Diehl 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

William Diehl has no disciplinary history to disclose.

## ITEM 4 – OTHER BUSINESS ACTIVITIES

In addition to his role at Beacon Pointe Advisors, LLC (“BPA”), William Diehl 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 William Diehl may earn a portion of these commissions.

Clients pay separate fees for advisory services and insurance products or services. In this capacity, William Diehl may offer insurance products and receive commissions from their sales. This arrangement creates an incentive for William Diehl 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 William Diehl or BPIS if they follow Mr. Diehl's recommendations.

## ITEM 5 – ADDITIONAL COMPENSATION

William Diehl 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. William Diehl is an equity owner in the parent company of the firm. Mr. Diehl 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 William Diehl 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, William Diehl oversees the investment advisory services provided by Beacon Pointe Advisors' Dallas, Texas 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 William Diehl. She can be reached by calling 949-718-1600.