



Form ADV Part 2B Brochure Supplement

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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

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ANNETTE E. BRINTON, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Annette E. Brinton, CFP®, Partner, Senior Wealth Advisor, b. 1969

Education:

BA, Business Economics, University of California, Santa Barbara

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Managing Member, Waypoint Wealth Partners, 2009-2025

Professional Designations

Annette Brinton 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

Annette Brinton has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Annette Brinton 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. Annette Brinton is an equity owner in the parent company of the firm. Ms. Brinton 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.

Jesse Shore, Partner, Managing Director, is generally responsible for supervising Annette Brinton's day-to-day advisory activities. Ms. Shore can be reached by calling 877-768-4802.

CHARLES L. BOWES, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Charles L. Bowes, CFP®, Partner, Senior Wealth Advisor, b. 1963

Education:

BA, Business Administration, California State University, San Diego

Business Background:

Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present

Managing Member, Waypoint Wealth Partners, 2009-2025

Professional Designations

Charles Bowes holds the following professional designation:

Certified Financial Planner (CFP®)

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ITEM 3 – DISCIPLINARY INFORMATION

Charles Bowes has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Charles Bowes 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. Charles Bowes is an equity owner in the parent company of the firm. Mr. Bowes 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.

Jesse Shore, Partner, Managing Director, is generally responsible for supervising Charles Bowes' day-to-day advisory activities. Ms. Shore can be reached by calling 877-768-4802.

COURTNEY B. HUTCHINSON, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Courtney B. Hutchinson, CFP®, Partner, Managing Director, b. 1979

Education:

BA, Economics, University of California, San Diego

Business Background:

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

Chief Operating Officer, Waypoint Wealth Partners, 2012-2025

Professional Designations

Courtney Hutchinson holds the following professional designation:

Certified Financial Planner (CFP®)

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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

Courtney Hutchinson has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Courtney Hutchinson 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. Courtney Hutchinson is an equity owner in the parent company of the firm. Ms. Hutchinson 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, Courtney Hutchinson oversees the investment advisory services provided by Beacon Pointe Advisors' Mill Valley, 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.

DANIEL W. CAMPBELL, CFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel W. Campbell, CFA®, Senior Strategic Investment Advisor, b. 1986

Education:

MS, Finance, Washington University

BS, Economics, Truman State University

Business Background:

Senior Strategic Investment Advisor, Beacon Pointe Advisors, LLC, 2025-Present

Director of Investments, Waypoint Wealth Partners, 2024-2025

Investment Strategy Advisor, Buckingham Strategic Wealth, LLC, 2014-2024

Professional Designations

Daniel Campbell 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

Daniel Campbell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Daniel Campbell 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. Campbell 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.

Courtney Hutchinson, Partner, Managing Director, is generally responsible for supervising Daniel Campbell's day-to-day advisory activities. Ms. Hutchinson can be reached by calling 877-768-4802.

JESSICA “JESSE” P. SHORE, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jessica “Jesse” P. Shore, CFP®, Partner, Managing Director, b. 1991

Education:

BA, Economics, Claremont McKenna College

Business Background:

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

Wealth Manager, Waypoint Wealth Partners, 2017-2025

Professional Designations

Jesse Shore holds the following professional designation:

Certified Financial Planner (CFP®)

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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

Jesse Shore has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Jesse Shore 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. Jesse Shore is an equity owner in the parent company of the firm. Ms. Shore 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, Jesse Shore oversees the investment advisory services provided by Beacon Pointe Advisors' Mill Valley, 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.

RACHEL A. SOWERS, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Rachel A. Sowers, CFP®, Senior Associate Wealth Advisor, b. 1991

Education:

MBA, Business Administration, Virginia Polytechnic Institute and State University
BS, Biological Sciences, Virginia Polytechnic Institute and State University

Business Background:

Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Associate Wealth Planner, Waypoint Wealth Partners, LLC, 2025-2025
Registered Representative, Raymond James & Associates, 2023-2024
Mass Transfer, Trust Advisory Services, Inc., 2021-2023
PCG Business Development Officer, BB&T Securities, 2019-2021

Professional Designations

Rachel Sowers holds the following professional designation:

Certified Financial Planner (CFP®)

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ITEM 3 – DISCIPLINARY INFORMATION

Rachel Sowers has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Rachel Sowers 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. Sowers 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.

Jesse Shore, Partner, Managing Director, is generally responsible for supervising Rachel Sowers' day-to-day advisory activities. Ms. Shore can be reached by calling 877-768-4802.

RACHELLE K. RODMAN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Rachelle K. Rodman, CFP®, Wealth Advisor, b. 1991

Education:

BA, Economics, Wheaton College, MA

BA, Psychology, Wheaton College, MA

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present

Agent, Beacon Pointe Insurance Services, LLC, 2026-Present

Service Advisor, Coyle Financial Counsel, LLC, 2016-2026

Professional Designations

Rachelle Rodman holds the following professional designation:

Certified Financial Planner (CFP®)

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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

Rachelle Rodman has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role at Beacon Pointe Advisors, LLC (“BPA”), Rachelle Rodman 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 Rachelle Rodman may earn a portion of these commissions.

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

In addition to Rachelle Rodman's role with Beacon Pointe Advisors, LLC, she serves as a Member of Money Motivation, LLC. This activity accounts for a de minimis amount of Rachelle Rodman'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

Rachelle Rodman'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. Rodman 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 Rachelle Rodman 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.

Jesse Shore, Partner, Managing Director, is generally responsible for supervising Rachelle Rodman's day-to-day advisory activities. Ms. Shore can be reached by calling 877-768-4802.