



# Form ADV Part 2B Brochure Supplement

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[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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# ANDREW J. SCANLON, CFP®, CSRIC®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Andrew J. Scanlon, CFP®, CSRIC®**, Wealth Advisor, b. 1987

### *Education:*

BA, Business Administration, Saint Michael's College

### *Business Background:*

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

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

Internal Consultant, Eaton Vance Distributors, Inc, 2014-2021

## Professional Designation

Andrew Scanlon 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 SRI Counselor™ (CSRIC®)*

The CSRIC® program is a designation program for financial professionals issued by the College for Financial Planning. It is accredited by the U.S. Department of Education Regional Accredited Agencies, The Higher Learning Commission (HLC).

Individuals with this professional designation have completed study and coursework in sustainable, responsible, and impact investing (SRI). It provides financial advisors and investment professionals with information about the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable investments. The CSRIC® Professional Education Program is a 3-semester credit graduate-level course. Students spend approximately 90-135 hours in

course-related activities to study and prepare adequately for the course examination. In addition, all CSRIC®s are required to complete 16 hours of continuing education credits every two years. More information regarding the CSRIC® is available at <https://www.cffp.edu/>.

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

Andrew Scanlon has no disciplinary history to disclose.

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

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

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

Andrew Scanlon'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. Scanlon 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.

Mark Mathers, Partner, Managing Director, is generally responsible for supervising Andrew Scanlon's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

# FLYNN T. MCDONNELL

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Flynn T. McDonnell**, Principal, Senior Wealth Advisor, b. 1958

*Education:*

JD, Law, St. Thomas University

BS, Business Management, Ithaca College

*Business Background:*

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

## ITEM 3 - DISCIPLINARY INFORMATION

Flynn McDonnell has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Flynn McDonnell'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. McDonnell 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.

Mark Mathers, Partner, Managing Director, is generally responsible for supervising Flynn McDonnell's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

# KRISTOPHER P. BRASSARD

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Kristopher P. Brassard**, Regional Director, b. 1990

*Education:*

BSBA, Finance, Minor in Economics, Stonehill College

*Business Background:*

Regional Director, Beacon Pointe Advisors, LLC, 2026-Present

Senior Associate, Sales – Edward Jones, Eaton Vance Distributors, Inc., 2015-2026

Senior Associate, Sales – Edward Jones, Eaton Vance Management, 2015-2026

## ITEM 3 - DISCIPLINARY INFORMATION

Kristopher Brassard has a disclosure on record; however, the Firm has determined that it does not constitute material disciplinary history reportable under this item. For additional information about Mr. Brassard please visit: <https://adviserinfo.sec.gov/>.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Kristopher Brassard's role with Beacon Pointe Advisors, LLC, he is the owner of Brassard Properties. This activity accounts for a de minimis amount of Kristopher Brassard'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

Kristopher Brassard 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. Brassard 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 Kristopher Brassard 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.

Matthew DiQuollo, National Regional Director, is generally responsible for supervising Kristopher Brassard's day-to-day advisory activities. Mr. DiQuollo can be reached by calling 973-287-5437.

# MARK V. MATHERS, CFP®, CSRIC®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Mark V. Mathers, CFP®, CSRIC®**, Partner, Managing Director, B. 1965

*Education:*

BA, Business Studies and Marketing, Ulster University

*Business Background:*

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

### Professional Designation

Mark Mathers 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 SRI Counselor™ (CSRIC®)*

The CSRIC® program is a designation program for financial professionals issued by the College for Financial Planning. It is accredited by the U.S. Department of Education Regional Accredited Agencies, The Higher Learning Commission (HLC).

Individuals with this professional designation have completed study and coursework in sustainable, responsible, and impact investing (SRI). It provides financial advisors and investment professionals with information about the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable investments. The CSRIC® Professional Education Program is a 3-semester credit graduate-level course. Students spend approximately 90-135 hours in course-related activities to study and prepare adequately for the course examination. In addition, all

CSRIC®s are required to complete 16 hours of continuing education credits every two years. More information regarding the CSRIC® is available at <https://www.cffp.edu/>.

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

Mark Mathers has no disciplinary history to disclose.

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

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

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

Mark Mathers 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. Mark Mathers is an equity owner in the parent company of the firm. Mr. Mathers 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, Mark Mathers oversees the investment advisory services provided by Beacon Pointe Advisors' Waltham, Massachusetts 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 949-718-1600.

# **MEDHA A. NADGIR**

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

**Medha A. Nadgir**, Director, Account Reporting, b. 1966

*Education:*

Certificate, Financial Planning, Boston University Center for Professional Education  
BE, Electrical & Electronics, Visvesvaraya National Institute of Technology  
B Tech, Electrical & Electronics, Institute of Technology Calicut

*Business Background:*

Director, Account Reporting, Beacon Pointe Advisors, LLC, 2023-Present  
Principal, Director of Client Service, Beacon Pointe Advisors, LLC, 2020-2023

## **ITEM 3 - DISCIPLINARY INFORMATION**

Medha Nadgir has no disciplinary history to disclose.

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

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Medha Nadgir 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. Nadgir 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.

Karisa Diephouse, Chief Operating Officer, is generally responsible for supervising Medha Nadgir's day-to-day advisory activities. Ms. Diephouse can be reached by calling 949-718-1600.

# MELISA DOBRACA IACONO, CDFFA®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Melisa Dobraca Iacono, CDFFA®**, Wealth Advisor, b. 1990

*Education:*

BS, Finance, University of Vermont

*Business Background:*

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

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2023

### Professional Designation

Melisa Dobraca Iacono holds the following professional designation:

*Certified Divorce Financial Analyst (CDFFA®)*

The designation is issued by the Institute for Divorce Financial Analysts. The candidate is required to develop their theoretical and practical understanding and knowledge of the financial aspects of divorce by completing a comprehensive course of study. The candidate must also have two years' minimum experience in a financial or legal capacity. The candidate must complete a four-part exam and demonstrate the practical application of this knowledge. Continuing education of 30 hours every two years is required to maintain the designation. More information about the CDFFA® can be found at: <https://www.institutedfa.com/>

## ITEM 3 - DISCIPLINARY INFORMATION

Melisa Dobraca Iacono has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Melisa Dobraca Iacono'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. Dobraca Iacono 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.

Mark Mathers, Partner, Managing Director, is generally responsible for supervising Melisa Dobraca lacono's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

# RYAN K. LEAHY

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Ryan K. Leahy**, Associate Wealth Advisor, b. 2001

*Education:*

BS, Finance, Providence College

*Business Background:*

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

Intern, Fidelity Investments, 2022-2023

Intern, CT Wealth Management, 2023

Student, Providence College, 2020-2023

## ITEM 3 - DISCIPLINARY INFORMATION

Ryan Leahy has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Ryan Leahy 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. Leahy 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.

Mark Mathers, Partner, Managing Director, is generally responsible for supervising Ryan Leahy's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

# VINCENT P. FRANKS

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Vincent P. Franks, Principal, Senior Wealth Advisor, b. 1977

*Education:*

BA, Accounting and Finance, Dublin City University

*Business Background:*

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

## ITEM 3 - DISCIPLINARY INFORMATION

Vincent Franks has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Vincent Franks 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. Franks 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.

Mark Mathers, Partner, Managing Director, is generally responsible for supervising Vincent Franks' day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.