



Form ADV Part 2B Brochure Supplement

May 2026

www.beaconpointe.com

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817-336-2000

Corporate Office:

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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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ALICIA M. LANGDON, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alicia M. Langdon, CFP®, Wealth Advisor, b. 1992

Education:

MS, Personal Financial Planning, Texas Tech University
BA, University Studies, Texas Tech University

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Manager, Whitley Penn Financial, 2018-2023

Professional Designations

Alicia Langdon 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

Alicia Langdon has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Alicia Langdon'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. Langdon 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, to help ensure compliance with applicable regulatory requirements.

William Rosenthal, Partner, Managing Director, is generally responsible for supervising Alicia Langdon's day-to-day advisory activities. Mr. Rosenthal can be reached by calling 817-336-2000.

ALISHA R. ROSENTHAL, CFP®, CRC®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alisha R. Rosenthal, CFP®, CRC®, Partner, Managing Director, b. 1981

Education:

BA, English, University of Texas

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

Registered Representative, Purshe Kaplan Sterling, 2021-2024

Registered Financial Associate, Rosenthal Advisory Services, LP, 2012-2021

Registered Representative, LPL Financial, LLC, 2017-2021

Professional Designations

Alisha Rosenthal 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>.

Certified Retirement Counselor (CRC®)

The CRC® certification is offered by the International Foundation of Retirement Education (“inFRE”) and obtained by passing completing a 200-question certification examination. The CRC® certification is a professional development program that enables financial professionals to address the challenges facing today’s retirees. The CRC® program was developed over a two-year period of original research and analysis by a team of 100 highly respected retirement practitioners in partnership with the academic guidance of the Center for Financial Responsibility at Texas Tech University. Prerequisites for this designation include a bachelor’s degree, two years of professional experience, and passing a background check. This

certification requires 15 hours of continuing education every year. To learn more about the CRC® certification, please visit <http://www.infre.org>.

ITEM 3 - DISCIPLINARY INFORMATION

Alisha Rosenthal has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role at Beacon Pointe Advisors, LLC ("BPA"), Alisha Rosenthal 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 Alisha Rosenthal may earn a portion of these commissions.

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

ITEM 5 - ADDITIONAL COMPENSATION

Alisha Rosenthal 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. Alisha Rosenthal is an equity owner in the parent company of the firm. Ms. Rosenthal 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 Alisha Rosenthal 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, Alisha Rosenthal oversees the investment advisory services provided by Beacon Pointe Advisors' Fort Worth, Texas 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, 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.

AMY L. HAMMOCK, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Amy L. Hammock, CFP®, Wealth Advisor, b. 1970

Education:

BA, Economics, University of Texas

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

Registered Representative, LPL Financial LLC, 2017-2021

Investment Advisor Representative, Rosenthal Advisory Services, LP, 2016-2021

Owner, Financial Advisor, Honor Private Wealth Mgt, LLC, 2015-2021

Professional Designations

Amy Hammock 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

Amy Hammock has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

Amy Hammock spends a portion of her time as a Registered Representative of Purshe Kaplan Sterling Investments, a non-affiliated registered broker-dealer. In this capacity, Amy Hammock may make security recommendations, offer investment products and/or effect securities transactions. When effecting transactions, Amy Hammock is eligible to receive compensation, commissions and/or trailing 12b-1 fees from Purshe Kaplan Sterling Investments for products held by BPA's advisory clients. This type of transaction-related compensation creates a conflict of interest, giving Amy Hammock an incentive to recommend investment products based on the additional compensation received.

BPA will not charge advisory fees on the portion of the client's portfolio that includes investment products for which Amy Hammock receives commissions and/or trailing 12b-1 fees. In all instances, BPA will ensure that BPA clients are provided with a disclosure that outlines the commissions and/or trailing 12b-1 fees that Amy Hammock receives.

ITEM 5 - ADDITIONAL COMPENSATION

Amy Hammock'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. Hammock 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 Amy Hammock 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, to help ensure compliance with applicable regulatory requirements.

Alisha Rosenthal, Partner, Managing Director, is generally responsible for supervising Amy Hammock's day-to-day advisory activities. Ms. Rosenthal can be reached by calling 817-336-2000.

CORY B. BRUNTZ, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Cory B. Bruntz, CFP®, Wealth Advisor, b. 1993

Education:

BSBA, Economics Collateral, University of Tennessee

Business Background:

Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2022-2024

Investment Advisor Representative, Rosenthal Advisory Services, LP, 2018-2021

Registered Representative, LPL Financial, LLC, 2017-2021

Professional Designations

Cory Bruntz 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

Cory Bruntz has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

Cory Bruntz'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. Bruntz 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 Cory Bruntz 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, to help ensure compliance with applicable regulatory requirements.

Alisha Rosenthal, Partner, Managing Director, is generally responsible for supervising Cory Bruntz's day-to-day advisory activities. Ms. Rosenthal can be reached by calling 817-336-2000.

MONTANA T. MURPHY

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Montana T. Murphy, Relationship Manager, b. 1997

Education:

BS, Finance, University of Alabama

Business Background:

Relationship Manager, Beacon Pointe Advisors, LLC, 2026-Present

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-2026

Student, University of Alabama, 2016-2022

ITEM 3 - DISCIPLINARY INFORMATION

Montana Murphy has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Montana Murphy 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. Murphy 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, to help ensure compliance with applicable regulatory requirements.

Alisha Rosenthal, Partner, Managing Director, is generally responsible for supervising Montana Murphy's day-to-day advisory activities. Ms. Rosenthal can be reached by calling 817-336-2000.

WILLIAM B. ROSENTHAL, CFP®, CFS®, ChFC®, CRC®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William B. Rosenthal, CFP®, CFS®, ChFC®, CRC®, Partner, Managing Director, b. 1964

Education:

BBA, Business, University of Texas

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present

Agent, Beacon Pointe Insurance Services, LLC, 2021-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2021-2024

President, Rosenthal Retirement Planning, 2005-2021

Chief Compliance Officer, Investment Advisor Representative, Rosenthal Advisory Services, LP, 2005-2021

Registered Representative, LPL Financial, LLC, 2017-2021

Professional Designations

William Rosenthal holds the following professional designations:

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>.

Chartered Financial Consultant (ChFC®)

The ChFC® designation has been a mark of excellence for financial planners for almost thirty years and currently requires more courses than any other financial planning credential. The curriculum covers extensive education and application training in all aspects of financial planning, income taxation, investments, and estate and retirement planning.

To attain the right to use the ChFC® marks, take a proctored exam for each course of study, have 3 years of full-time, relevant business experience within the five years preceding the awarding of the designation, and complete a minimum of 30 hours continuing education every two years. More information regarding the ChFC® can be found at <https://www.theamericancollege.edu/designations-degrees/ChFC>.

Certified Fund Specialist (CFS®)

The CFS® designation is offered by the Institute of Business & Finance (“IBF”). Candidates must have a Bachelor's degree or 2,000 hours of financial services work experience. The CFS program consists of 6 modules: (1) Regulation, Structure, Expenses, and Titling; (2) Management and Fund Selection, Risk Management, Equities, Fixed-Income & Hybrids; (3) Tax-Free Bonds, Money Market, Specialty Categories, and Time Value Analysis; (4) Asset Categories, Market Indicators, CEFs, ETFs, and REITs; (5) Risk, Timing the Market, When to Sell, and Taxation; (6) Basics of Asset Allocation, The Efficient Frontier, Optimal Asset Allocation, Core-Satellite Strategy, Modern Portfolio Theory (“MPT”). 30 hours of continuing education is required every 2 years to maintain this designation. More information is available at <https://icfs.com/certified-fund-specialist>.

Certified Retirement Counselor (CRC®)

The CRC® certification is offered by the International Foundation of Retirement Education (“INFRE”) and obtained by passing completing a 200-question certification examination. The CRC® certification is a professional development program that enables financial professionals to address the challenges facing today’s retirees. The CRC® program was developed over a two-year period of original research and analysis by a team of 100 highly respected retirement practitioners in partnership with the academic guidance of the Center for Financial Responsibility at Texas Tech University. Prerequisites for this designation include a bachelor’s degree, two years of professional experience, and passing a background check. This certification requires 15 hours of continuing education every year. To learn more about the CRC® certification, please visit <http://www.infre.org>.

ITEM 3 - DISCIPLINARY INFORMATION

William Rosenthal has no material disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

William Rosenthal 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 Rosenthal is an equity owner in the parent company of the firm. Mr. Rosenthal 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 Rosenthal 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 Rosenthal oversees the investment advisory services provided by Beacon Pointe Advisors' Fort Worth, 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, 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.