



## Form ADV Part 2B Brochure Supplement

May 2026

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

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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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# ANDREW T. HALL, CFP®, CPA

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Andrew T. Hall, CFP®, CPA**, Wealth Advisor, b. 1996

### *Education:*

M.Acc, Accounting, Western Carolina University  
BSBA, Accounting, Appalachian State University

### *Business Background:*

Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present  
Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-2026  
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-2025  
Senior Client Service Associate, Beacon Pointe Advisor, LLC, 2022-2023  
Auditor, FORVIS/DHG, 2021-2022

## Professional Designations

Andrew Hall 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 Public Accountant (CPA)*

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management

advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

To maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

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

Andrew Hall has no disciplinary history to disclose.

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

Andrew Hall 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 Hall'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. Hall 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.

Christine Nelson, Principal, Director of Operations, is generally responsible for supervising Andrew Hall's day-to-day advisory activities. Ms. Nelson can be reached by calling 828-684-2600.

# **BRENDAN M. REIDY, JR.**

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

**Brendan M. Reidy, Jr.**, Regional Director, b. 1977

*Education:*

BA, History, Dartmouth College

*Business Background:*

Regional Director, Beacon Pointe Advisors, LLC, 2023-Present

Senior Wealth Advisor, The Mather Group LLC, 2021-2022

Regional Vice President, Mercer Global Advisors Inc., 2020-2021

## **ITEM 3 - DISCIPLINARY INFORMATION**

Brendan Reidy has no disciplinary history to disclose.

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

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

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

# JEFFREY B. HOWDEN

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Jeffrey B. Howden**, Senior Wealth Advisor, b. 1972

*Education:*

MBA, University of Pittsburgh

MA, University of North Carolina Chapel Hill

BA, Accounting and Business Management, Furman University

*Business Background:*

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present

Investment Advisor, Altavista Wealth Management, 2015-2022

## ITEM 3 - DISCIPLINARY INFORMATION

Jeffrey Howden has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Jeffrey Howden's role with Beacon Pointe Advisors, LLC, he is a limited partner of WWM Partners (two private real estate funds). Jeffrey Howden is also a member of Eagle View Properties, LLC. He serves as a trustee for a non-client family trust and receives compensation for acting in this capacity. These activities account for a de minimis amount of Jeffrey Howden's time and income. These activities are 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

Jeffrey Howden'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. Howden 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 Jeffrey Howden 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.

Lewis Akers, Partner, Managing Director, is generally responsible for supervising Jeffrey Howden's day-to-day advisory activities. Mr. Akers can be reached by calling 828-684-2600.

# JONATHAN E. SHUMATE, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Jonathan E. Shumate, CFP®**, Principal, Senior Wealth Advisor, b. 1974

*Education:*

BBA, Marketing, James Madison University

*Business Background:*

Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present

Wealth Advisor, Altavista Wealth Management, 2016-2022

### Professional Designations

Jonathan Shumate 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

Jonathan Shumate has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Jonathan Shumate'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. Shumate 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.

Lewis Akers, Partner, Managing Director, is generally responsible for supervising Jonathan Shumate's day-to-day advisory activities. Mr. Akers can be reached by calling 828-684-2600.

# KYLE R. BOYD

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Kyle R. Boyd**, Partner, Managing Director, b. 1959

*Education:*

JD, Juris Doctor, Samford University

BS, History, University of Alabama

*Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2022-Present

Managing Principal, Altavista Wealth Management, Inc., 2003-2022

## ITEM 3 - DISCIPLINARY INFORMATION

Kyle Boyd has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Kyle Boyd 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. Kyle Boyd is an equity owner in the parent company of the firm. Mr. Boyd 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, Kyle Boyd oversees the investment advisory services provided by Beacon Pointe Advisors' Asheville, North Carolina 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.

# LEWIS DANIEL AKERS, JR., CFP®, CPA

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Lewis Daniel Akers, Jr., CFP®, CPA**, Partner, Managing Director, b. 1960

### *Education:*

MBA, Master of Business Administration, Wake Forest University  
BA, Spanish, University of Virginia

### *Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2022-Present  
Agent, Beacon Pointe Insurance Services, LLC, 2022-Present  
Managing Principal, Altavista Wealth Management, Inc., 2003-2022

## Professional Designations

Lewis Daniel Akers, Jr. 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>.

### *Certified Public Accountant (CPA)*

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

To maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

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

Lewis Daniel Akers, Jr. has no disciplinary history to disclose.

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

In addition to his role at Beacon Pointe Advisors, LLC ("BPA"), Lewis Daniel Akers, Jr. 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 Lewis Daniel Akers, Jr. may earn a portion of these commissions.

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

In addition to Lewis Daniel Akers, Jr.'s role with Beacon Pointe Advisors, LLC, he is the sole owner of L. Daniel Akers, Jr., CPA. He performs tax return preparation for non-clients and some clients for compensation. This compensation is exclusive of compensation paid through Beacon Pointe Advisors, LLC.

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

Lewis Daniel Akers, Jr 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. Lewis Daniel Akers, Jr is an equity owner in the parent company of the firm. Mr. Akers 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 Lewis Daniel Akers, Jr 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, Lewis Daniel Akers, Jr oversees the investment advisory services provided by Beacon Pointe Advisors' Asheville, North Carolina 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.

# LOGAN L. BOLICK, CFP®, CFA®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Logan L. Bolick, CFP®, CFA®**, Principal, Senior Wealth Advisor, b. 1990

### *Education:*

BS, Business Administration, University of North Carolina at Chapel Hill

### *Business Background:*

Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present

Partner, Wealth Advisor, Altavista Wealth Management, Inc., 2013-2022

## Professional Designations

Logan Bolick 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 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**

Logan Bolick has no disciplinary history to disclose.

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

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

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

Logan Bolick'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. Bolick 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.

Lewis Akers, Partner, Managing Director, is generally responsible for supervising Logan Bolick's day-to-day advisory activities. Mr. Akers can be reached by calling 828-684-2600.

# MARY MARGARET KISER, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mary Margaret Kiser, CFP®, Wealth Advisor, b. 1988

*Education:*

BS, Political Science, University of the South - Sewanee

*Business Background:*

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

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-2023

Client Service Associate, Beacon Pointe Advisors, LLC, 2022-2022

Client Service Associate, Altavista Wealth Management, 2017-2022

### Professional Designations

Mary Margaret Kiser holds the following professional designation:

*Certified Financial Planner (CFP®)*

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## ITEM 3 - DISCIPLINARY INFORMATION

Mary Margaret Kiser has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## **ITEM 5 - ADDITIONAL COMPENSATION**

Mary Margaret Kiser'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. Kiser 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.

Lewis Akers, Partner, Managing Director, is generally responsible for supervising Mary Margaret Kiser's day-to-day advisory activities. Mr. Akers can be reached by calling 828-684-2600.