



## Form ADV Part 2B Brochure Supplement

May 2026

### Individuals covered by this supplement include:

Gregory L. Gionfriddo  
Marc S. Wolff

James P. Cooper  
Mark D. Generales

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

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Bonita Springs, FL 34135  
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#### Corporate Office:

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

This brochure supplement provides information about the above listed individuals that supplements the Beacon Pointe Advisors, LLC brochure. 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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# GREGORY L. GIONFRIDDO

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Gregory L. Gionfriddo**, Senior Wealth Advisor, b. 1969

*Education:*

BS, Social Science, Florida State University

*Business Background:*

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

Agent, Beacon Pointe Insurance Services, LLC, 2022-Present

Registered Representative, Purshe Kaplan Sterling Investments, Inc., 2022-2023

Wealth Advisor, Southern Trust Financial Planning, Inc., 2019-2021

Registered Representative, Securities America Inc., 2018-2022

## ITEM 3 - DISCIPLINARY INFORMATION

Gregory Gionfriddo has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

## ITEM 5 - ADDITIONAL COMPENSATION

Gregory Gionfriddo'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. Gionfriddo 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 Gregory Gionfriddo 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.

Marc Wolff, Partner, Managing Director, is generally responsible for supervising Gregory Gionfriddo's day-to-day advisory activities. Mr. Wolff can be reached by calling 239-676-5676.

# JAMES P. COOPER

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**James P. Cooper**, Partner, Senior Wealth Advisor, b. 1969

*Education:*

MS, Economics, Florida State University

BS, Economics and Finance, Florida State University

*Business Background:*

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

Agent, Beacon Pointe Insurance Services, LLC, 2022-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2022-2024

Senior Vice President of Investments, Investment Advisor Representative, Southern Trust Financial Planning, Inc., 2004-2022

Registered Representative, Securities America, Inc., 2009-2022

## ITEM 3 - DISCIPLINARY INFORMATION

James Cooper has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

## ITEM 5 - ADDITIONAL COMPENSATION

James Cooper 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. James Cooper is an equity owner in the parent company of the firm. Mr. Cooper 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 James Cooper 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.

Marc Wolff, Partner, Managing Director, is generally responsible for supervising James Cooper's day-to-day advisory activities. Mr. Wolff can be reached by calling 239-676-5676.

# MARC S. WOLFF

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Marc S. Wolff**, Partner, Managing Director, b. 1969

*Education:*

BS, Business Administration, University of Florida

*Business Background:*

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

Agent, Beacon Pointe Insurance Services, LLC, 2022-Present

Registered Representative, Purshe Kaplan Sterling Investments, 2022-2024

President, Chief Compliance Officer, Southern Trust Financial Planning, Inc., 2009-2022

Registered Representative, Securities America, Inc., 2009-2022

## ITEM 3 - DISCIPLINARY INFORMATION

Marc Wolff has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

Marc Wolff is also a Manager of Chelle Bug, LLC, through which he owns a salon and spa. This activity is not investment-related, and accounts for a de minimis portion of Mr. Wolff's time.

## ITEM 5 - ADDITIONAL COMPENSATION

Marc Wolff 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. Marc Wolff is an equity owner in the parent company of the firm. Mr. Wolff 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 Marc Wolff 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, Marc Wolff oversees the investment advisory services provided by Beacon Pointe Advisors' Sarasota, Florida 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.

# MARK D. GENERALES

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Mark D. Generales**, Senior Wealth Advisor, b. 1950

*Education:*

Mark Generales has not received any higher education degrees after high school. However, he attended the University of Massachusetts from 1970-1974.

*Business Background:*

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present  
Agent, Beacon Pointe Insurance Services, LLC, 2022-Present  
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-2024  
Registered Representative, Purshe Kaplan Sterling Investments, Inc., 2022-2024  
Investment Advisor Representative, Southern Trust Financial Planning, Inc., 2010-2021  
Registered Representative, Securities America Inc., 2009-2022

## ITEM 3 - DISCIPLINARY INFORMATION

Mark Generales 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. Generales please visit: <https://adviserinfo.sec.gov/>

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

## ITEM 5 - ADDITIONAL COMPENSATION

Mark Generales' 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. Generales 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 Mark Generales 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.

Marc Wolff, Partner, Managing Director, is generally responsible for supervising Mark Generales' day-to-day advisory activities. Mr. Wolff can be reached by calling 239-676-5676.