



**Form ADV
Part 2B Brochure Supplement**

May 2026

Individuals covered by this supplement include:

Amanda A. Magee
Jeanne G. Sullivan
Jennifer D. Kundrot
Philip C. Lee

www.beaconpointe.com

Office Location:

92 Montvale Avenue, Suite 2050
Stoneham, MA 02180
781-587-0582

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

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AMANDA A. MAGEE, FPQP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Amanda A. Magee, FPQP®, Principal, Operations Manager, b. 1980

Education:

BA, Art History, Keene State College

Business Background:

Principal, Operations Manager, Beacon Pointe Advisors, LLC, 2026-Present

Principal, Operations Manager, Financially in Tune, LLC, 2017-Present

Professional Designations

Amanda Magee holds the following professional designation:

Financial Paraplanner Qualified Professional (FPQP®)

The Financial Paraplanner Qualified Professional (FPQP®) designation program is offered by the College for Financial Planning, a Kaplan Company. It is designed for new professionals entering the financial services industry, as well as frontline employees, and support staff with some industry experience looking to deepen their foundational knowledge.

Individuals enrolled in the FPQP® designation program will complete the following courses: The Financial Planning Process, Business Ownership, Cash Management, and the Use of Debt, The Time Value of Money, Insurance Basics and Property Insurance, Life and Health Insurance, Investment Basics and Strategies, Retirement Planning, Tax Implications of Financial Decisions, Estate Planning Basics, Case Study and Master Index. Upon completion of the FPQP®, graduates receive exemption from course FP511 in the College's CFP® certification education program. For those who currently hold a professional designation from the College, completion of a new professional designation fulfills CE hours as part of the renewal of the current designation. More information about the FPQP® is available at <https://www.kaplanfinancial.com/wealth-management>.

ITEM 3 - DISCIPLINARY INFORMATION

Amanda Magee has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Amanda Magee is also an Investment Adviser Representative (IAR) with Financially in Tune, LLC, a Registered Investment Adviser with the Securities and Exchange Commission (SEC). In May 2026, Financially in Tune, LLC was acquired by Beacon Pointe Advisors, LLC. Amanda Magee will temporarily maintain her IAR registration to transition any remaining advisory business under Financially in Tune, LLC to Beacon Pointe. The time she spends on activities related to Financially in Tune, LLC is minimal.

ITEM 5 - ADDITIONAL COMPENSATION

Amanda Magee 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. Magee 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 Amanda Magee 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.

Jeanne Sullivan, Partner, Managing Director, is generally responsible for supervising Amanda Magee's day-to-day advisory activities. Ms. Sullivan can be reached by calling 781-587-0582.

JEANNE G. SULLIVAN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jeanne G. Sullivan, CFP®, Partner, Managing Director, b. 1957

Education:

MA, Law and Diplomacy, The Fletcher School at Tufts University
BA, Economics, Mount Holyoke College

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, 2026-Present
Founder, Principal, Managing Member, Financially in Tune, LLC, 2011-Present

Professional Designations

Jeanne Sullivan 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

Jeanne Sullivan has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Jeanne Sullivan is also an Investment Adviser Representative (IAR) with Financially in Tune, LLC, a Registered Investment Adviser with the Securities and Exchange Commission (SEC). In May 2026, Financially in Tune, LLC was acquired by Beacon Pointe Advisors, LLC. Jeanne Sullivan will temporarily maintain her IAR registration to transition any remaining advisory business under Financially in Tune, LLC to Beacon Pointe. The time she spends on activities related to Financially in Tune, LLC is minimal.

ITEM 5 - ADDITIONAL COMPENSATION

Jeanne Sullivan 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. Jeanne Sullivan is an equity owner in the parent company of the firm. Ms. Sullivan 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 Jeanne Sullivan 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, Jeanne Sullivan oversees the investment advisory services provided by Beacon Pointe Advisors' Stoneham, Massachusetts 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.

JENNIFER D. KUNDROT, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jennifer D. Kundrot, CFP®, Senior Wealth Advisor, b. 1977

Education:

BS, Mechanical Engineering, Cornell University

Business Background:

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

Principal, Wealth Manager, Financially in Tune, LLC, 2022-Present

Financial Planner, Salem Five Investment Services, 2016-2022

Professional Designations

Jennifer Kundrot 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

Jennifer Kundrot has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Jennifer Kundrot is also an Investment Adviser Representative (IAR) with Financially in Tune, LLC, a Registered Investment Adviser with the Securities and Exchange Commission (SEC). In May 2026, Financially in Tune, LLC was acquired by Beacon Pointe Advisors, LLC. Jennifer Kundrot will temporarily maintain her IAR registration to transition any remaining advisory business under Financially in Tune, LLC to Beacon Pointe. The time she spends on activities related to Financially in Tune, LLC is minimal.

In addition to Jennifer Kundrot's role with Beacon Pointe Advisors, LLC, she is the owner of rental property. This activity accounts for a de minimis amount of Jennifer Kundrot'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

Jennifer Kundrot'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. Kundrot 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 Jennifer Kundrot 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.

Jeanne Sullivan, Partner, Managing Director, is generally responsible for supervising Jennifer Kundrot's day-to-day advisory activities. Ms. Sullivan can be reached by calling 781-587-0582.

PHILIP C. LEE, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Philip C. Lee, CFP®, Partner, Managing Director, b. 1964

Education:

BA, Economics, Kalamazoo College

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, 2026-Present

Principal, Chief Compliance Officer, Financially in Tune, LLC, 2019-Present

Professional Designations

Philip Lee 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

Philip Lee has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Philip Lee is also an Investment Adviser Representative (IAR) with Financially in Tune, LLC, a Registered Investment Adviser with the Securities and Exchange Commission (SEC). In May 2026, Financially in Tune, LLC was acquired by Beacon Pointe Advisors, LLC. Philip Lee will temporarily maintain his IAR registration to transition any remaining advisory business under Financially in Tune, LLC to Beacon Pointe. The time he spends on activities related to Financially in Tune, LLC is minimal.

ITEM 5 - ADDITIONAL COMPENSATION

Philip Lee 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. Philip Lee is an equity owner in the parent company of the firm. Mr. Lee 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 Philip Lee 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, Philip Lee oversees the investment advisory services provided by Beacon Pointe Advisors' Stoneham, 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, 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.