



**Form ADV
Part 2B Brochure Supplement**

June 2026

Individuals covered by this supplement include:

Allison R. Kvikstad
Valerie I. Marquez

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Campbell, CA 95008
408-261-3300

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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ALLISON R. KVIKSTAD, CDFA[®], CFP[®]

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Allison R. Kvikstad, CDFA[®], CFP[®], Partner, Managing Director, b. 1971

Education:

MA, Finance, Golden Gate University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2024-Present

Financial Advisor, Ellevest, 2018-2024

Professional Designations

Allison Kvikstad holds the following professional designations:

Certified Divorce Financial Analyst (CDFA[®])

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 CDFA[®] can be found at: <https://www.institutedfa.com/>

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

Allison Kvikstad has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Allison Kvikstad 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. Allison Kvikstad is an equity owner in the parent company of the firm. Ms. Kvikstad 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, Allison Kvikstad oversees the investment advisory services provided by Beacon Pointe Advisors' Plano, Texas and Campbell, California offices. 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.

VALERIE I. MARQUEZ

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Valerie I. Marquez, Senior Associate Wealth Advisor, b. 1988

Education:

BA, Political Science, University of California, San Diego

Business Background:

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

Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-2026

Client Services Manager, Ellevest, 2022-2024

Senior Client Service Associate, Tolleson Wealth Management, 2017-2022

ITEM 3 - DISCIPLINARY INFORMATION

Valerie Marquez has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Valerie Marquez 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. Marquez 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.

Allison Kvikstad, Partner, Managing Director, is generally responsible for supervising Valerie Marquez's day-to-day advisory activities. Ms. Kvikstad can be reached by calling 408-261-3300.