Form ADV
Part 2B Brochure Supplement

June 2026

Individuals covered by this supplement include:

Daniel W. Bloom
Jesse C. Lazar
Matthew R. Jentner
Seth M. Jentner
Will M. Smith

www.beaconpointe.com

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3677 Embassy Parkway
Akron, OH 44333
330-668-1000

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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DANIEL W. BLOOM, CEPA®, CFP®, NSSA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel W. Bloom, CEPA®, CFP®, NSSA®, Partner, Managing Director, b. 1971

Education:
BA, Business Administration, Malone University

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2025-Present
Vice President & Chief Administrative Officer, The Jentner Corporation, 2018-2025

Professional Designations

Daniel Bloom holds the following professional designations:

Certified Exit Planning Advisor, (CEPA®)

The Certified Exit Planning Advisor (CEPA®) designation is awarded by the Exit Planning Institute. The candidate must complete a five-day MBA style program that concludes with a proctored exam. Candidates must also meet all the following requirements:

- Five years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business-broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity.
- Undergraduate degree from a qualifying institution; if no qualifying degree candidate must submit additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies).
- Continuing Education: To retain the CEPA designation the designee must obtain 40 hours of Continuing Education ("CE") every three years and remain in good standing with Exit Planning Institute.

More information is available at The Exit Planning Institute

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.

The National Social Security Advisor (NSSA®)

The National Social Security Advisor™ (NSSA®) credential is administered through the National Social Security Association™. To achieve the credential, one must have a job function that includes advising clients about Social Security Benefits choices. To achieve the Advisor status, one must complete the NSAA® administered course and pass the final examination. Certificate renewal requires 16 hours of continuing education every two years. More information about the NSSA® is available at https://www.nssapros.com/.

ITEM 3 – DISCIPLINARY INFORMATION

Daniel Bloom has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Daniel Bloom 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. Daniel Bloom is an equity owner in the parent company of the firm. Mr. Bloom 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, Daniel Bloom oversees the investment advisory services provided by Beacon Pointe Advisors' Akron, Ohio 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.

JESSE C. LAZAR, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jesse C. Lazar, CFP®, Senior Associate Wealth Advisor, b. 1990

Education:
BBA, Financial Planning and Services, University of Akron

Business Background:
Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Senior Associate Financial Planner, The Jentner Corporation, 2023-2025
Financial Planning Associate, The Jentner Corporation, 2014-2023

Professional Designations

Jesse Lazar 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

Jesse Lazar has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Jesse Lazar 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. Lazar 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.

Matthew Jentner, Partner, Managing Director, is generally responsible for supervising Jesse Lazar's day-to-day advisory activities. Mr. Jentner can be reached by calling 330-668-1000.

MATTHEW R. JENTNER, CFP®, CPA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew R. Jentner, CFP®, CPA, Partner, Managing Director, b. 1980

Education:
BS, Accountancy, University of Akron

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2025-Present
Vice President & Chief Financial Officer, The Jentner Corporation, 2018-2025

Professional Designations

Matthew Jentner 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

Matthew Jentner has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Matthew Jentner 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. Matthew Jentner is an equity owner in the parent company of the firm. Mr. Jentner 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, Matthew Jentner oversees the investment advisory services provided by Beacon Pointe Advisors' Akron, Ohio 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.

SETH M. JENTNER, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Seth M. Jentner, CFP®, Partner, Managing Director, b. 1978

Education:
BS, Chemical Engineering, University of Akron
MBA, Business Administration, Indiana University

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2025-Present
Vice President & Chief Operating Officer, The Jentner Corporation, 2018-2025

Professional Designations

Seth Jentner 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

Seth Jentner has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Seth Jentner 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. Seth Jentner is an equity owner in the parent company of the firm. Mr. Jentner 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, Seth Jentner oversees the investment advisory services provided by Beacon Pointe Advisors' Akron, Ohio 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.

WILL M. SMITH, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Will M. Smith, CFP®, Senior Associate Wealth Advisor, b. 1991

Education:
BS, Finance, Grove City College

Business Background:
Senior Associate Wealth Advisor, Beacon Pointe Advisors, 2025-Present
Financial Planning Associate, The Jentner Corporation, 2016-2025

Professional Designations

Will Smith 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

Will Smith has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Will Smith 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. Smith 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.

Matthew Jentner, Partner, Managing Director, is generally responsible for supervising Will Smith's day-to-day advisory activities. Mr. Jentner can be reached by calling 330-668-1000.