



Form ADV Part 2B Brochure Supplement

June 2026

Individuals covered by this supplement include:

Dylan C. Simons

Matthew S. "Scott" Moser

www.beaconpointe.com

Office Location:

2135 112th Avenue NE, Suite 100
Bellevue, WA 98004
425-818-9400

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

Table of Contents

<i>DYLAN C. SIMONS</i>	3
<i>MATTHEW S. "SCOTT" MOSER, CPA, PFS™</i>	5

DYLAN C. SIMONS

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Dylan C. Simons, Wealth Advisor, b. 1989

Education:

BA, Finance, Western Washington University

Business Background:

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

Agent, Beacon Pointe Insurance Services, LLC, 2026-Present

Registered Representative, Raymond James Financial Services Advisors, Inc., 2020-2026

Registered Representative, Raymond James Financial Services, Inc., 2020-2026

Owner, LG's Kitchen LLC, 2020-2025

ITEM 3 – DISCIPLINARY INFORMATION

Dylan Simons has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

Dylan Simons 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. Simons 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 Dylan Simons 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.

Scott Moser, Partner, Managing Director, is generally responsible for supervising Dylan Simons' day-to-day advisory activities. Mr. Moser can be reached by calling 425-818-9400.

MATTHEW S. “SCOTT” MOSER, CPA, PFS™

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew S. “Scott” Moser, CPA, PFS™, Partner, Managing Director, b. 1959

Education:

MS, Taxation, Golden Gate University

BS, Accounting, Central Washington University

Business Background:

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2025-Present

President, Moser Wealth Advisors, PLLC, 2006-2025

President, Moser & Company, PLLC, 2006-2025

Professional Designations

Scott Moser holds the following professional designations:

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.

Personal Financial Specialist (PFS™)

The Personal Financial Specialist (PFS) credential is granted exclusively to CPAs with tax expertise and comprehensive knowledge of financial planning. All areas of personal financial planning — estate, retirement, investments and insurance — have tax implications, and only a CPA/PFS has the experience, ethics and expertise to get the job done right. The American Institute of Certified Public Accountants (AICPA) established the Personal Financial Specialist (PFS) credential, which is reserved for CPAs, meaning holding a CPA is a prerequisite. There are both educational and professional requirements that must be met before earning a PFS. However, the benefits of holding a PFS are numerous, which include expanded employment opportunities with corporations, consulting firms, and the ability to manage or own a wealth

management practice. More information regarding the PFS is available at <https://www.aicpa-cima.com/home>.

ITEM 3 – DISCIPLINARY INFORMATION

Scott Moser has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Scott Moser 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. Scott Moser is an equity owner in the parent company of the firm. Mr. Moser 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, Scott Moser oversees the investment advisory services provided by Beacon Pointe Advisors' Bellevue, Washington 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.