



# Form ADV Part 2B Brochure Supplement

June 2026

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

**Office Location:**

134 Rumford Avenue, Suite 203  
Newton, MA 02466  
617-630-4978

**Corporate Office:**

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

This brochure supplement provides information about the individuals listed in the Table of Contents who are supervised persons of Beacon Pointe Advisors, LLC. 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 below listed individuals is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

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# ANDREW F. HOLMES, CFP®, CSLP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Andrew F. Holmes, CFP®, CSLP®,** Wealth Advisor, b. 1997

### *Education:*

BS, Finance, Bentley University

### *Business Background:*

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

Financial Planner, Financial Planning Solutions, LLC, 2019-2025

## Professional Designations

Andrew Holmes holds the following professional designations:

### *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>.

### *Certified Student Loan Professional (CSLP®)*

The Certified Student Loan Professional (CSLP®) designation is issued by the Certified Student Loan Advisors Board of Standards. It is a professional credential for financial professionals who have completed specialized training in the analysis of federal and private student loan programs and repayment strategies. To earn the CSLP designation, candidates must complete a structured educational program covering student loan repayment options, forgiveness programs, tax considerations, and the integration of student loan planning into broader financial planning. Candidates must also pass course examinations and a proctored final certification exam. CSLP designees are required to complete an annual renewal to maintain the credential. More information about the CSLP designation is available at [www.cslainstitute.org](http://www.cslainstitute.org).

### **ITEM 3 – DISCIPLINARY INFORMATION**

Andrew Holmes has no disciplinary history to disclose.

### **ITEM 4 - OTHER BUSINESS ACTIVITIES**

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

### **ITEM 5 - ADDITIONAL COMPENSATION**

Andrew Holmes' 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. Holmes 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.

Lyman Jackson, Partner, Managing Director, is generally responsible for supervising Andrew Holmes' day-to-day advisory activities. Mr. Jackson can be reached by calling 617-630-4978.

# DILLON F. DRISCOLL

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Dillon F. Driscoll**, Associate Wealth Advisor, b. 2002

*Education:*

BS, Finance, Bentley University

*Business Background:*

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

Paraplanner, Financial Planning Solutions, LLC, 2024-2025

Student, Bentley University, 2021-2025

Intern, Manganaro Building, LLC, 2023-2023

DPW Associate, Town of Danvers, 2021-2023

## ITEM 3 – DISCIPLINARY INFORMATION

Dillon Driscoll has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Dillon Driscoll 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. Driscoll 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.

Lyman Jackson, Partner, Managing Director, is generally responsible for supervising Dillon Driscoll's day-to-day advisory activities. Mr. Jackson can be reached by calling 617-630-4978.

# JANET RHODES FRIEDMAN, CDFA®, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Janet Rhodes Friedman, CDFA®, CFP®, Senior Wealth Advisor, b. 1956

### *Education:*

MBA, General Management, Tuck School of Business at Dartmouth  
BA, Management Science, Duke University

### *Business Background:*

Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present  
Senior Financial Advisor, Financial Planning Solutions, LLC, 2022-2025  
Wealth Advisor, Abaris Financial Group, LLC, 2019-2022  
Investment Advisor Representative, Carson Wealth Management, 2019-2022

## Professional Designations

Janet Rhodes Friedman 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

Janet Rhodes Friedman has no disciplinary history to disclose.

### ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Janet Rhodes Friedman's role with Beacon Pointe Advisors, LLC, she serves as an Investment Committee member of the West Concord Union Church, Trustee for the Town of Concord, and Trustee for The Scholarship Fund of Concord and Carlisle. These activities account for a de minimis amount of Janet Rhodes Friedman's time and income. These activities are 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

Janet Rhodes Friedman'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. Friedman 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 Janet Rhodes Friedman 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.

Lyman Jackson, Partner, Managing Director, is generally responsible for supervising Janet Rhodes Friedman's day-to-day advisory activities. Mr. Jackson can be reached by calling 617-630-4978.

# LYMAN H. JACKSON, AIF®, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Lyman H. Jackson, AIF®, CFP®, Partner, Managing Director, b. 1961

### *Education:*

MBA, Marketing and International Finance, Northeastern University  
BSBA, Marketing, Boston University

### *Business Background:*

Partner, Managing Director, Beacon Pointe Advisors, LLC, 2026-Present  
Managing Partner, Financial Planning Solutions, LLC, 2013-2026

## Professional Designations

Lyman Jackson holds the following professional designations:

### *Accredited Investment Fiduciary (AIF®)*

The AIF® designation is issued by the Center for Fiduciary Studies. To earn the designation, each AIF® candidate must complete either a web-based or capstone program, pass a final certification exam, and complete a minimum of 6 hours of continuing education per year. AIF® designees must also sign and agree to abide by a code of ethics. More information about the AIF® is available at <https://www.fi360.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

Lyman Jackson has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Lyman Jackson's role with Beacon Pointe Advisors, LLC, he serves as Landlord of Jackson Properties, this activity accounts for a de minimis amount of Lyman Jackson'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

Lyman Jackson 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. Lyman Jackson is an equity owner in the parent company of the firm. Mr. Lyman 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 Lyman Jackson 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, Lyman Jackson oversees the investment advisory services provided by Beacon Pointe Advisors' Newton, 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.

# MARGARET “MAGGIE” A. DOLAN

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Margaret “Maggie” A. Dolan**, Relationship Manager, b. 1969

*Education:*

BS, Management, Bentley University

*Business Background:*

Relationship Manager, Beacon Pointe Advisors, LLC, 2026-Present

Client Service Specialist, Financial Planning Solutions, LLC, 2022-2026

Unemployed, 2021-2022

Director of Operations and Chief Compliance Officer, Rosenblum Silverman Sutton SF Inc., 2013-2021

## ITEM 3 – DISCIPLINARY INFORMATION

Maggie Dolan has no disciplinary history to disclose.

## ITEM 4 - OTHER BUSINESS ACTIVITIES

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

## ITEM 5 - ADDITIONAL COMPENSATION

Maggie Dolan 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. Dolan 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.

Lyman Jackson, Partner, Managing Director, is generally responsible for supervising Maggie Dolan’s day-to-day advisory activities. Mr. Jackson can be reached by calling 617-630-4978.

# RICHARD “RICK” H. FINGERMAN, CDFA®, CFP®

## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Richard “Rick” H. Fingerman, CDFA®, CFP®, Partner, Managing Director, b. 1960

### *Education:*

Rick Fingerman has not received any higher education degrees after high school.

### *Business Background:*

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

Managing Partner, Financial Planning Solutions, LLC, 2013-2025

## Professional Designations

Rick Fingerman 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®)*

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### ITEM 3 – DISCIPLINARY INFORMATION

Rick Fingerman has no disciplinary history to disclose.

### ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Rick Fingerman's role with Beacon Pointe Advisors, LLC, he serves as Owner of Rental Real Estate Property, his activity accounts for a de minimis amount of Rick Fingerman'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

Rick Fingerman 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. Rick Fingerman is an equity owner in the parent company of the firm. Mr. Fingerman 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 Rick Fingerman 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, Rick Fingerman oversees the investment advisory services provided by Beacon Pointe Advisors' Newton, 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.