Form ADV
Part 2B Brochure Supplement

August 2026

Individuals covered by this supplement include:

Andrew B. Chhor

David A. Monsees

Jack L. Schneider

Michael D. Joslin

www.beaconpointe.com

Office Location:
11431 Willows Road NE, Suite 120
Redmond, WA 98052
425-688-0555

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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ANDREW B. CHHOR, CFP®

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Andrew B. Chhor, CFP®, Wealth Advisor**,** b. 1999

Education:
MBA, Business Administration, Washington State University
BS, Public Health, University of Washington

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Planning Consultant, Fidelity Investments, 2021-2026
Student, University of Washington, 2020-2021

Professional Designations

Andrew Chhor 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

Andrew Chhor has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Andrew Chhor 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 Chhor's 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. Chhor 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.

Michael Joslin, Partner, Managing Director, is generally responsible for supervising Andrew Chhor's day-to-day advisory activities. Mr. Joslin can be reached by calling 425-688-0555.

DAVID A. MONSEES

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David A. Monsees, Wealth Advisor**,** b. 1988

Education:
BS, Electrical Engineering, North Carolina State University

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Investment Advisor Representative, Joslin Capital Advisors, LLC, 2023-2024
Client Service Associate, Joslin Capital Advisors, LLC, 2022-2023
Investment Advisor Representative, First Command Advisory Servies, Inc., 2021-2022
Insurance Agent, First Command Insurance Servies, Inc., 2021-2022
Registered Representative, First Command Financial Planning, Inc., 2021-2022

ITEM 3 – DISCIPLINARY INFORMATION

David Monsees has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 5 – ADDITIONAL COMPENSATION

David Monsees' 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. Monsees 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.

Michael Joslin, Partner, Managing Director, is generally responsible for supervising David Monsees' day-to-day advisory activities. Mr. Joslin can be reached by calling 425-688-0555.

JACK L. SCHNEIDER

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jack L. Schneider, Associate Wealth Advisor**,** b. 1999

Education:
BA, Financial Planning, Arizona State University

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Branch Office Administrator, Edward Jones, 2023-2026
Customer Service Representative, Mountain Pacific Bank, 2021-2023
Real Estate Agent, Keller Williams, 2020-2022
Installer, American Railworks, 2020-2021

ITEM 3 – DISCIPLINARY INFORMATION

Jack Schneider has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 5 – ADDITIONAL COMPENSATION

Jack Schneider 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. Schneider 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.

Charissa Portillo, Client Service Manager, is generally responsible for supervising Jack Schneider's day-to-day advisory activities. Ms. Portillo can be reached by calling 425-688-0555.

MICHAEL D. JOSLIN, CIMA®, CPA, PFS™

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael D. Joslin, CIMA®, CPA, PFS™, Partner, Managing Director**,** b. 1957

Education:
BA, Accounting, University of Washington

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2024-Present
Chief Executive Officer, Joslin Capital Advisors, LLC, 2017-2024

Professional Designations

Michael Joslin holds the following professional designation(s):

Certified Investment Management Analyst (CIMA®)

The CIMA® designation is issued by the Investments and Wealth Institute (formerly IMCA). To earn each certification, each CIMA® candidate must complete a self-study program, attend a one-week classroom education program provided by an Association to Advance Collegiate Schools of Business ("AACSB") accredited university business school, pass an online examination after self-study and an on-line comprehensive certification examination after meeting all requirements of a registered classroom education program and also complete a minimum of 30 hours of continuing education every two years. More information about the CIMA® is available at https://investmentsandwealth.org/home.

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

Michael Joslin has no disciplinary history to disclose.

ITEM 4 – OTHER BUSINESS ACTIVITIES

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

ITEM 5 – ADDITIONAL COMPENSATION

Michael Joslin 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. Michael Joslin is an equity owner in the parent company of the firm. Michael Joslin 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, Michael Joslin oversees the investment advisory services provided by Beacon Pointe Advisors' Redmond, 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.