Form ADV
Part 2B Brochure Supplement

September 2026

Individuals covered by this supplement include:

Casey D. Paton

Elizabeth L. Bivings

Maria Faleyev

Mark P. Haser

Megan Y. Allen

www.beaconpointe.com

Office Location:
115 Newbury Street, Suite 302
Boston, MA 02116
617-542-2420

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

CASEY D. PATON, CFP®, CFA *3*
ELIZABETH L. BIVINGS, CFP®, CDFA® *6*
MARIA FALEYEV, CFA *8*
MARK P. HASER, CFP® *10*
MEGAN Y. ALLEN *12*

CASEY D. PATON, CFP®, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Casey D. Paton, CFP®, CFA, Partner, Senior Wealth Advisor, b. 1979

Education:
MS, Finance, Boston College
BS, Finance, Villanova University

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Agent, Beacon Pointe Insurance Services, LLC, 2026-Present
VP II PBWM MFO Relationship Management, First Citizens Investor Services, 2023-2026
Relationship Manager, SVB Investment Services, Inc., 2022-2026
Relationship Manager, Silicon Valley Bank, 2021-2023
Relationship Manager, SVB Wealth Advisory, 2021-2022
Financial Advisor Trainee-FADP, Bank of America, N.A., 2020-2021
Financial Advisor Trainee-FADP, Merrill Lunch, Pierce, Fenner & Smith Incorporated, 2020-2021

Professional Designations

Casey Paton 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.

Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst ("CFA®") designation is sponsored by CFA Institute. To earn a CFA charter, candidates must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The three proctored course exams correspond to three 250-hour self-study levels. Completing the Program takes most candidates between two and five years. More information regarding the CFA is available at https://www.cfainstitute.org/

ITEM 3 - DISCIPLINARY INFORMATION

Casey Paton has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

In addition to Casey Paton's role with Beacon Pointe Advisors, LLC, he is the Founder and Owner of Encore Apparel, Co. This activity accounts for a de minimis amount of Casey Paton'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

Casey Paton 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. Casey Paton is an equity owner in the parent company of the firm. Mr. Paton 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 Casey Paton 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.

Elizabeth Bivings, Partner, Managing Director, is generally responsible for supervising Casey Paton's day-to-day advisory activities. Ms. Bivings can be reached by calling 617-542-2420.

ELIZABETH L. BIVINGS, CFP®, CDFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Elizabeth L. Bivings, CFP®, CDFA®, Partner, Managing Director, b. 1958

Education:
PhD, MA, Applied Economics, Stanford University
MSc, Economics, London School of Economics and Political Science
MA, International Trade and Finance, University of Sussex, England
AB, International Relations, Pomona College

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2024-Present
Founder and CEO, Artemis Financial Advisors, 2008-2024

Professional Designations

Elizabeth Bivings 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 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/

ITEM 3 - DISCIPLINARY INFORMATION

Elizabeth Bivings has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Elizabeth Bivings 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. Elizabeth Bivings is an equity owner in the parent company of the firm. Ms. Bivings 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, Elizabeth Bivings oversees the investment advisory services provided by Beacon Pointe Advisors' Boston, Massachusetts office. 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.

MARIA FALEYEV, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Maria Faleyev, CFA, Strategic Investment Advisor, b. 1997

Education:
BS, Economics and Finance, Bentley University

Business Background:
Strategic Investment Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Portfolio Associate, Artemis Financial Advisors, 2022-2024
Performance Analyst, Meketa Investment Group, 2020-2022

Professional Designations

Maria Faleyev holds the following professional designation:

Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst ("CFA®") designation is sponsored by CFA Institute. To earn a CFA charter, candidates must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. The three proctored course exams correspond to three 250-hour self-study levels. Completing the Program takes most candidates between two and five years. More information regarding the CFA is available at https://www.cfainstitute.org/

ITEM 3 - DISCIPLINARY INFORMATION

Maria Faleyev has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Maria Faleyev 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. Faleyev 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.

Elizabeth Bivings, Partner, Managing Director, is generally responsible for supervising Maria Faleyev’s day-to-day advisory activities. Ms. Bivings can be reached by calling 617-542-2420.

MARK P. HASER, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark P. Haser, CFP®, Partner, Senior Wealth Advisor, b. 1983

Education:
MBA, Boston College
BA, Economics, Wake Forest University

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Partner, Wealth Advisor, Artemis Financial Advisors, 2018-2024

Professional Designations

Mark Haser 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

Mark Haser has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Mark Haser 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. Mark Haser is an equity owner in the parent company of the firm. Mr. Haser 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.

Elizabeth Bivings, Partner, Managing Director, is generally responsible for supervising Mark Haser's day-to-day advisory activities. Ms. Bivings can be reached by calling 617-542-2420.

MEGAN Y. ALLEN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Megan Y. Allen, Associate Wealth Advisor, b. 2003

Education:
MS, General Finance, University of Rochester Simon Business School
BS, Business, University of Rochester

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Teaching Assistant, University of Rochester, 2025-2026
Full-time Student, University of Rochester, 2021-2026
Portfolio Management Intern, Conifer Realty LLC, 2024-2025
Aftercare Assistant, YMCA of Greater Rochester, 2023-2024
Summer Camp Counselor, YMCA Of Greater Rochester, 2021-2023

ITEM 3 - DISCIPLINARY INFORMATION

Megan Allen has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Megan Allen 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. Allen 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.

Mark Haser, Partner, Senior Wealth Advisor, is generally responsible for supervising Megan Allen's day-to-day advisory activities. Mr. Haser can be reached by calling 617-542-2420.