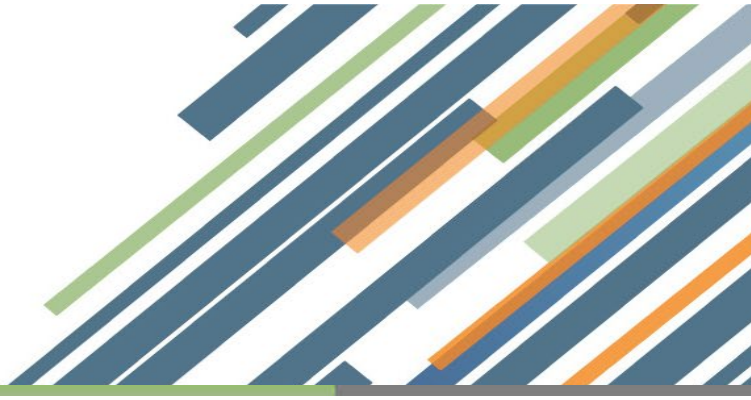
BEACON POINTE ADVISORS

Form ADV
Part 2B Brochure Supplement

October 2026



www.beaconpointe.com

Located At:
11601 Wilshire Boulevard, Suite 1950
Los Angeles, CA 90025
310-269-1876

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 above listed individuals is also available on the SEC's website at www.adviserinfo.sec.gov

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CHRISTOPHER C. PHILLIPS, CEPA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christopher C. Phillips, CEPA®, Partner, Senior Wealth Advisor, b. 1989

Education:
BA, International Business, Whittier College

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Senior Portfolio Manager, BNY Mellon, 2018-2024

Professional Designations

Christopher Phillips holds the following professional designation:

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

ITEM 3 - DISCIPLINARY INFORMATION

Christopher Phillips has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Christopher Phillips 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. Christopher Phillips is an equity owner in the parent company of the firm. Mr. Phillips 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Christopher Phillips' day-to-day advisory activities. Ms. Yuill can be reached by calling 310-269-1876.

INDYA M. YUILL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Indya M. Yuill, Partner, Managing Director, b. 1986

Education:
BS, Business Administration, Finance, University of Southern California Marshall School of Business

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2020-Present

ITEM 3 - DISCIPLINARY INFORMATION

Indya Yuill has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Indya Yuill 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. Indya Yuill is an equity owner in the parent company of the firm. Ms. Yuill 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, Indya Yuill oversees the investment advisory services provided by Beacon Pointe Advisors' Los Angeles, California 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.

JULIA M. CUMMINGS

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Julia M. Cummings, Senior Wealth Advisor, b. 1987

Education:
BA, Anthropology, Amherst College

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present
Agent, Beacon Pointe Insurance Services, LLC, 2026-Present

ITEM 3 - DISCIPLINARY INFORMATION

Julia Cummings has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to her role at Beacon Pointe Advisors, LLC ("BPA"), Julia Cummings 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 Julia Cummings may earn a portion of these commissions.

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

ITEM 5 - ADDITIONAL COMPENSATION

Julia Cummings' 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. Cummings 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 Julia Cummings 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Julia Cummings' day-to-day advisory activities. Ms. Yuill can be reached by calling 310-269-1876.

KEVIN M. KLEIN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kevin M. Klein, CFP®, Senior Associate Wealth Advisor, b. 1992

Education:
MBA, California State University, Dominguez Hills
BS, Accounting, California State University, Long Beach

Business Background:
Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Delivery Driver – Independent Contractor, Uber Eats, 2025-Present
Trader, Morton Capital Management, LLC, 2021-2025

Professional Designations

Kevin Klein 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

Kevin Klein has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Kevin Klein's role with Beacon Pointe Advisors, LLC, he is an independent contracted delivery driver for Uber Eats. This activity accounts for a de minimis amount of Kevin Klein'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

Kevin Klein 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. Klein 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 Kevin Klein 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Kevin Klein's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-269-1876.

MATTHEW D. MACDONALD, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew D. MacDonald, CFA, Senior Wealth Advisor, b. 1979

Education:
BCom, Commerce, Finance, University of British Columbia Sauder School of Business

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present
Registered Representative, Wells Fargo Clearing Services, LLC, 2018-2021
Wealth Advisor, Wells Fargo Bank, 2018-2021

Professional Designations

Matthew MacDonald 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

Matthew MacDonald has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew MacDonald 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 MacDonald'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. MacDonald 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Matthew MacDonald's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-269-1876.

TRENTON B. JOLLY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Trenton B. Jolly, CFP®, Wealth Advisor, b. 1996

Education:
BA, Economics, University of California, Los Angeles

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2024

Professional Designations

Trenton Jolly 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

Trenton Jolly has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Trenton Jolly'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. Jolly 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising Trenton Jolly's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-269-1876.

WILLIAM G. BLACKARD III, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William G. Blackard III, CFP®, Senior Associate Wealth Advisor, b. 1997

Education:
MBA, University of Florida
BS, Business Administration, University of North Carolina

Business Background:
Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-2026
Senior Revenue Growth Manager, Reynolds American Inc., 2023-2024
Lead Revenue Growth Manager, Reynolds American Inc., 2021-2023
Global Graduate – Trade Marketing, Reynolds American Inc., 2021-2021
Global Graduate – Brand Marketing, Reynolds American Inc., 2020-2021

Professional Designations

William Blackard 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

William Blackard has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

William Blackard 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. Blackard 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.

Indya Yuill, Partner, Managing Director, is generally responsible for supervising William Blackard's day-to-day advisory activities. Ms. Yuill can be reached by calling 310-269-1876.