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Part 2B Brochure Supplement

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www.beaconpointe.com

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San Diego, CA 92130
888-756-7568

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

Table of Contents

ANTHONY G. FERREIRA, CFP® ***3***

BROOKSHER L. MORGAN, CFP® ***5***

DOUGLAS G. BOLLES, CAP® ***7***

JOHN H. CHAPMAN, CFP® ***9***

MORGAN H. SMITH, CFP® ***11***

SCOTT W. O'BRIEN, CFP® ***13***

ANTHONY G. FERREIRA, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Anthony G. Ferreira, CFP®, Partner, Senior Wealth Advisor, b. 1974

Education:
BS, Business Administration, San Diego State University

Business Background:
Partner, Senior Wealth Advisors, Beacon Pointe Advisors, LLC, 2026-Present
Advisory Representative, Wealthpointe, LLC, 2013-2026

Professional Designations

Anthony Ferreira 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

Anthony Ferreira has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Anthony Ferreira 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. Anthony Ferreira is an equity owner in the parent company of the firm. Mr. Ferreira 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.

Allison Blake, Partner, Transition Support Manager, is generally responsible for supervising Anthony Ferreira's day-to-day advisory activities. Ms. Blake can be reached by calling 888-756-7568.

BROOKSHER L. MORGAN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brooksher "Brooks" L. Morgan, CFP®, Partner, Senior Wealth Advisor, b. 1989

Education:
BBA, Finance, University of Texas at Austin

Business Background:
Partner, Senior Wealth Advisors, Beacon Pointe Advisors, LLC, 2026-Present
Investment Advisor Representative, Wealthpointe, LLC, 2013-2026
Investment Advisor Representative, Constitution Wealth, LLC, 2021-2025

Professional Designations

Brooks Morgan holds the following professional designation:

Certified Financial Planner (CFP®)

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ITEM 3 – DISCIPLINARY INFORMATION

Brooks Morgan has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Brooks Morgan 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. Brooks Morgan is an equity owner in the parent company of the firm. Mr. Morgan 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.

Allison Blake, Partner, Transition Support Manager, is generally responsible for supervising Brooks Morgan's day-to-day advisory activities. Ms. Blake can be reached by calling 888-756-7568.

DOUGLAS G. BOLLES, CAP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Douglas G. Bolles, CAP®, Partner, Managing Director, b. 1960

Education:
BA, Government & Legal Studies and Philosophy, Bowdoin College

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2026-Present
Partner, Wealthpointe, LLC, 2019-2026

Professional Designations

Douglas Bolles holds the following professional designation:

Chartered Advisor in Philanthropy (CAP®)

The Chartered Advisor in Philanthropy (CAP®) designation is issued by The American College of Financial Services, Candidates must have three years of full-time, relevant business experience within the five years preceding the certification. Relevant experience may include working in a non-profit organization, serving on the nonprofit board or volunteering. Candidates must complete three courses and certify compliance with The American College Code of Ethics and Procedures. Participation in the annual Professional Recertification Program (RPP) is required to maintain the designation. More information about the CAP® Program is available at https://www.theamericancollege.edu.

ITEM 3 – DISCIPLINARY INFORMATION

Douglas Bolles has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Douglas Bolles 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. Douglas Bolles is an equity owner in the parent company of the firm. Mr. Bolles 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, Douglas Bolles oversees the investment advisory services provided by Beacon Pointe Advisors' Tyler, Texas 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.

JOHN H. CHAPMAN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

John H. Chapman, CFP®, Partner, Senior Wealth Advisor, b. 1988

Education:
BA, Communication, University of Washington

Business Background:
Partner, Senior Wealth Advisors, Beacon Pointe Advisors, LLC, 2026-Present
Investment Advisor Representative, Wealthpointe, LLC, 2018-2026
Investment Advisor Representative, Constitution Wealth, LLC, 2021-2024

Professional Designations

John Chapman 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

John Chapman has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

John Chapman 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. John Chapman is an equity owner in the parent company of the firm. Mr. Chapman 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.

Allison Blake, Partner, Transition Support Manager, is generally responsible for supervising John Chapman's day-to-day advisory activities. Ms. Blake can be reached by calling 888-756-7568.

MORGAN H. SMITH, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Morgan H. Smith, CFP®, Partner, Senior Wealth Advisor, b. 1963

Education:
BA, Computer Science, University of San Diego
MBA, International Business, University of San Diego

Business Background:
Partner, Senior Wealth Advisors, Beacon Pointe Advisors, LLC, 2026-Present
Investment Advisor Representative, Wealthpointe, LLC, 2013-2026
Investment Advisor Representative, Constitution Wealth, LLC, 2022-2025

Professional Designations

Morgan Smith holds the following professional designation:

Certified Financial Planner (CFP®)

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ITEM 3 – DISCIPLINARY INFORMATION

Morgan Smith has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Morgan Smith's role with Beacon Pointe Advisors, LLC, he is an author. This activity accounts for a de minimis amount of Morgan Smith'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

Morgan Smith 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. Morgan Smith is an equity owner in the parent company of the firm. Mr. Smith 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.

Allison Blake, Partner, Transition Support Manager, is generally responsible for supervising Morgan Smith's day-to-day advisory activities. Ms. Blake can be reached by calling 888-756-7568.

SCOTT W. O'BRIEN, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Scott W. O'Brien, CFP®, Partner, Senior Wealth Advisor, b. 1960

Education:
DC, Chiropractic, Cleveland College
BA, Business Administration, University of Maine

Business Background:
Partner, Senior Wealth Advisors, Beacon Pointe Advisors, LLC, 2026-Present
Investment Advisor Representative, Wealthpointe, LLC, 2013-2026
Investment Advisor Representative, Constitution Wealth, LLC, 2023-2025

Professional Designations

Scott O'Brien holds the following professional designation:

Certified Financial Planner (CFP®)

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ITEM 3 – DISCIPLINARY INFORMATION

Scott O'Brien has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Scott O'Brien 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 O'Brien 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 O'Brien is an equity owner in the parent company of the firm. Mr. O'Brien 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.

Allison Blake, Partner, Transition Support Manager, is generally responsible for supervising Scott O'Brien's day-to-day advisory activities. Ms. Blake can be reached by calling 888-756-7568.