Form ADV
Part 2B Brochure Supplement

November 2026

www.beaconpointe.com

Located At:
400 Totten Pond Road, Suite 220
Waltham, MA 02451
617-614-9895

Corporate Office:
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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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ANDREW J. SCANLON, CFP®, CSRIC®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Andrew J. Scanlon, **CFP®, CSRIC®,** Wealth Advisor, b. 1987

Education:
BA, Business Administration, Saint Michael's College

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Senior Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-2024
Internal Consultant, Eaton Vance Distributors, Inc, 2014-2021

Professional Designation

Andrew Scanlon 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 SRI Counselor™ (CSRIC®)

The CSRIC® program is a designation program for financial professionals issued by the College for Financial Planning. It is accredited by the U.S. Department of Education Regional Accredited Agencies, The Higher Learning Commission (HLC).

Individuals with this professional designation have completed study and coursework in sustainable, responsible, and impact investing (SRI). It provides financial advisors and investment professionals with information about the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable investments. The CSRIC® Professional Education Program is a 3-semester credit graduate-level course. Students spend approximately 90-135 hours in

course-related activities to study and prepare adequately for the course examination. In addition, all CSRIC®s are required to complete 16 hours of continuing education credits every two years. More information regarding the CSRIC® is available at https://www.cffp.edu/.

ITEM 3 - DISCIPLINARY INFORMATION

Andrew Scanlon has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Andrew Scanlon 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 Scanlon'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. Scanlon 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 Mathers, Partner, Managing Director, is generally responsible for supervising Andrew Scanlon's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

FLYNN T. MCDONNELL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Flynn T. McDonnell, Principal, Senior Wealth Advisor, b. 1958

Education:
JD, Law, St. Thomas University
BS, Business Management, Ithaca College

Business Background:
Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present

ITEM 3 - DISCIPLINARY INFORMATION

Flynn McDonnell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Flynn McDonnell'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. McDonnell 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 Mathers, Partner, Managing Director, is generally responsible for supervising Flynn McDonnell's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

KRISTOPHER P. BRASSARD

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kristopher P. Brassard, Regional Director, b. 1990

Education:
BSBA, Finance, Minor in Economics, Stonehill College

Business Background:
Regional Director, Beacon Pointe Advisors, LLC, 2026-Present
Senior Associate, Sales – Edward Jones, Eaton Vance Distributors, Inc., 2015-2026
Senior Associate, Sales – Edward Jones, Eaton Vance Management, 2015-2026

ITEM 3 - DISCIPLINARY INFORMATION

Kristopher Brassard has a disclosure on record; however, the Firm has determined that it does not constitute material disciplinary history reportable under this item. For additional information about Mr. Brassard please visit: https://adviserinfo.sec.gov/.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to Kristopher Brassard's role with Beacon Pointe Advisors, LLC, he is the owner of Brassard Properties. This activity accounts for a de minimis amount of Kristopher Brassard'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

Kristopher Brassard 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. Brassard 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 Kristopher Brassard is eligible to receive is outlined above in ***Item 4 – Other Business Activities***.

ITEM 6 - SUPERVISION

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Matthew DiQuollo, National Regional Director, is generally responsible for supervising Kristopher Brassard's day-to-day advisory activities. Mr. DiQuollo can be reached by calling 973-287-5437.

MARK V. MATHERS, CFP®, CSRIC®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark V. Mathers, **CFP®, CSRIC®,** Partner, Managing Director, B. 1965

Education:
BA, Business Studies and Marketing, Ulster University

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

Professional Designation

Mark Mathers 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.

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Chartered SRI Counselor™ (CSRIC®)

The CSRIC® program is a designation program for financial professionals issued by the College for Financial Planning. It is accredited by the U.S. Department of Education Regional Accredited Agencies, The Higher Learning Commission (HLC).

Individuals with this professional designation have completed study and coursework in sustainable, responsible, and impact investing (SRI). It provides financial advisors and investment professionals with information about the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable investments. The CSRIC® Professional Education Program is a 3-semester credit graduate-level course. Students spend approximately 90-135 hours in course-related activities to study and prepare adequately for the course examination. In addition, all

CSRIC®s are required to complete 16 hours of continuing education credits every two years. More information regarding the CSRIC® is available at https://www.cffp.edu/.

ITEM 3 - DISCIPLINARY INFORMATION

Mark Mathers has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Mark Mathers 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 Mathers 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 Mathers is an equity owner in the parent company of the firm. Mr. Mathers 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, Mark Mathers oversees the investment advisory services provided by Beacon Pointe Advisors' Waltham, 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.

MEDHA A. NADGIR

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Medha A. Nadgir, Director, Account Reporting, b. 1966

Education:
Certificate, Financial Planning, Boston University Center for Professional Education
BE, Electrical & Electronics, Visvesvaraya National Institute of Technology
B Tech, Electrical & Electronics, Institute of Technology Calicut

Business Background:
Director, Account Reporting, Beacon Pointe Advisors, LLC, 2023-Present
Principal, Director of Client Service, Beacon Pointe Advisors, LLC, 2020-2023

ITEM 3 - DISCIPLINARY INFORMATION

Medha Nadgir has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Medha Nadgir 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. Nadgir 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.

Karisa Diephouse, Chief Operating Officer, is generally responsible for supervising Medha Nadgir's day-to-day advisory activities. Ms. Diephouse can be reached by calling 949-718-1600.

MELISA DOBRACA IACONO, CDFA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Melisa Dobraca Iacono, **CDFA®,** Wealth Advisor, b. 1990

Education:
BS, Finance, University of Vermont

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-2023

Professional Designation

Melisa Dobraca Iacono holds the following professional designation:

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

Melisa Dobraca Iacono has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Melisa Dobraca Iacono'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. Dobraca Ianono 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 Mathers, Partner, Managing Director, is generally responsible for supervising Melisa Dobraca Iacono's day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.

MICHAEL S. MAGLIO JR.

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael S. Maglio Jr., Associate Wealth Advisor, b. 2002

Education:
BA, Psychology & Economics, Colby College

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Client Service Associate, Charter Advisory Group, 2024-2025
Student, Colby College, 2020-2024

ITEM 3 - DISCIPLINARY INFORMATION

Michael Maglio has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael Maglio 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 Maglio 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. Maglio 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.

Robert Santamaria, Relationship Manager, is generally responsible for supervising Michael Maglio's day-to-day advisory activities. Mr. Santamaria can be reached by calling 617-614-9895.

RYAN K. LEAHY

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ryan K. Leahy, Associate Wealth Advisor, b. 2001

Education:
BS, Finance, Providence College

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Intern, Fidelity Investments, 2022-2023
Intern, CT Wealth Management, 2023
Student, Providence College, 2020-2023

ITEM 3 - DISCIPLINARY INFORMATION

Ryan Leahy has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Ryan Leahy 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. Leahy 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.

Robert Santamaria, Relationship Manager, is generally responsible for supervising Ryan Leahy's day-to-day advisory activities. Mr. Santamaria can be reached by calling 617-614-9895.

VINCENT P. FRANKS

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Vincent P. Franks, Principal, Senior Wealth Advisor, b. 1977

Education:
BA, Accounting and Finance, Dublin City University

Business Background:
Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2020-Present

ITEM 3 - DISCIPLINARY INFORMATION

Vincent Franks has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Vincent Franks 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. Franks 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 Mathers, Partner, Managing Director, is generally responsible for supervising Vincent Franks' day-to-day advisory activities. Mr. Mathers can be reached by calling 617-614-9895.