Form ADV
Part 2B Brochure Supplement

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www.beaconpointe.com

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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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CAMERON P. CRAIN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Cameron P. Crain, Associate Wealth Advisor, b. 2000

Education:
BSBA, Finance, University of Central Florida

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Client Service Associate, Beacon Pointe Advisors, LLC, 2025-2026
Cart Barn, Interlachen Country Club, 2024-2024
Student, University of Central Florida, 2021-2024
Student, Johnson County Community College, 2019-2021

ITEM 3 - DISCIPLINARY INFORMATION

Cameron Crain has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Cameron Crain 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. Crain 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.

James Ferrell, Partner, Managing Director, is generally responsible for supervising Cameron Crain's day-to-day advisory activities. Mr. Ferrell can be reached by calling 407-629-7008.

CRYSTAL S. GARNER

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Crystal S. Garner, Principal, Senior Wealth Advisor**,** b. 1963

Education:
BA, Organizational Communication, Rollins College

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

ITEM 3 - DISCIPLINARY INFORMATION

Crystal Garner has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Crystal Garner'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. Garner 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.

James Ferrell, Partner, Managing Director, is generally responsible for supervising Crystal Garner's day-to-day advisory activities. Mr. Ferrell can be reached by calling 407-629-7008.

EDWARD R. MOOR

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Edward R. Moor, Wealth Advisor**,** b. 1992

Education:
BSB, Business, George Washington University

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Agent, Beacon Pointe Insurance Services, LLC, 2021-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-2024
Senior Associate, Kite Capital Partners, 2017-2021

ITEM 3 - DISCIPLINARY INFORMATION

Edward Moor has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

Edward Moor'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 she services. Mr. Moor 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 Edward Moor 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.

James Ferrell, Partner, Managing Director, is generally responsible for supervising Edward Moor's day-to-day advisory activities. Mr. Ferrell can be reached by calling 407-629-7008.

JAMES W. FERRELL, CFP®, CIMC, CPA, PFS™

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

James W. Ferrell, CFP®, CIMC, CPA, PFS™, Partner, Managing Director, b. 1958

Education:
MBA, Finance, Florida State University
BS, Accounting and Finance, University of Central Florida

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

Professional Designations

James Ferrell 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.

Certified Investment Management Consultant (CIMC)

As of December 2003, new CIMC certifications are no longer granted. When the designation was issued, its content focused on investment consulting. Current CIMC designees can maintain the designation through Investments & Wealth Institute. CIMC designees are required to adhere to The Institute's *Code of Professional Responsibility*, *Rules and Guidelines for Use of the Marks*, and have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements. CIMC designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the designation.

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

James Ferrell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

Additionally, James Ferrell is a Member of Ferrell & Kelly, LLC, through which he has ownership in Ferrell & Kelly Certified Public Accountants ("Ferrell & Kelly"), a Certified Public Accountancy firm. This activity accounts for a de minimis amount of James Ferrell's time and income. Ferrell & Kelly provide tax and accounting services to certain Beacon Pointe's clients in its Winter Park, Florida office. James Ferrell will, at times, recommend clients of Beacon Pointe to utilize the services of Ferrell & Kelly for their accountancy needs. There are no fees paid for such referrals. As Member of Ferrell & Kelly, James Ferrell shares in the profits of Ferrell & Kelly. Therefore, even if James Ferrell does not directly perform services for Ferrell & Kelly's clients, he receives remuneration from those who do, some of which are clients of Beacon Pointe. The additional receipt of compensation creates a conflict of interest in that Mr. Ferrell has a financial incentive to recommend Ferrell & Kelly to Beacon Pointe clients as opposed to other accounting firms. To mitigate these conflicts, they are disclosed to the clients of Beacon Pointe at the time of their engagement with Beacon Pointe through the delivery of this Brochure Supplement. Further, clients are made aware that they are under no obligation to utilize Ferrell & Kelly for their accounting needs and are free to select any accountant/accountancy firm of their choosing.

In addition to James Ferrell's role with Beacon Pointe Advisors, LLC, he serves as President of Winter Park Investment Group, Inc., and as a Director of Ferrell Business Services and Winter Park National Bank. These activities account for a de minimis amount of James Ferrell'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

James Ferrell 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. James Ferrell is an equity owner in the parent company of the firm. Mr. Ferrell 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 James Ferrell is eligible to receive is outlined above in ***Item 4 – Other Business Activities.***

ITEM 6 - SUPERVISION

As a Partner, Managing Director at Beacon Pointe Advisors, LLC, James Ferrell oversees the investment advisory services provided by Beacon Pointe Advisors' Winter Park, Florida 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.

JENNINGS "J.L." L. HURT, IV

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jennings "J.L." L. Hurt, IV, Principal, Senior Wealth Advisor**,** b. 1981

Education:
MBA, Rollins College
BS, Business Administration, Rhodes College

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

ITEM 3 - DISCIPLINARY INFORMATION

J.L. Hurt has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to J.L. Hurt's role with Beacon Pointe Advisors, LLC, he serves as a board member with Drink B4 beverage company and Give Hope Foundation. These activities account for a de minimis amount of J.L. Hurt's time and income. These activities are unrelated and to Beacon Pointe Advisors, LLC's advisory business. Beacon Pointe Advisors, LLC, does not believe they present a conflict of interest.

ITEM 5 - ADDITIONAL COMPENSATION

J.L. Hurt'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 she services. Mr. Hurt 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 J.L. Hurt 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.

James Ferrell, Partner, Managing Director, is generally responsible for supervising J.L. Hurt's day-to-day advisory activities. Mr. Ferrell can be reached by calling 407-629-7008.

PAIGE L. GOLL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Paige L. Goll, Principal, Senior Strategic Investment Advisor**,** b. 1981

Education:
MF, Finance, Tulane University
BA, Communications, Tulane University

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

ITEM 3 - DISCIPLINARY INFORMATION

Paige Goll has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Paige Goll'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. Goll 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.

James Ferrell, Partner, Managing Director, is generally responsible for supervising Paige Goll's day-to-day advisory activities. Mr. Ferrell can be reached by calling 407-629-7008.

WILLIAM J. FERRELL, CFP®, CPA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William J. Ferrell, CFP®, CPA, Wealth Advisor**,** b. 1995

Education:
MA, Accounting, University of Central Florida
BSBA, Accounting and Finance, University of Central Florida

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Agent, Beacon Pointe Insurance Services, LLC, 2024-Present
Regional Director, Goldman Sachs & Co. LLC, 2021-2024
Private Wealth Associate, Sanford C. Bernstein & Co., LLC, 2020-2021

Professional Designations

William Ferrell 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.

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.

ITEM 3 - DISCIPLINARY INFORMATION

William Ferrell has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

William Ferrell'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. Ferrell 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 William Ferrell 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.

James Ferrell, Partner, Managing Director, is generally responsible for supervising William Ferrell's day-to-day advisory activities. Mr. Ferrell can be reached by calling 407-629-7008.