Form ADV
Part 2B Brochure Supplement

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www.beaconpointe.com

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Dallas, TX 75225
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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 below listed individuals is also available on the SEC's website at www.adviserinfo.sec.gov

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ALEXANDER W. PIERCE, III

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alexander W. Pierce, III, Partner, Senior Wealth Advisor**,** b. 1956

Education:
BBA, Finance, Southern Methodist University

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Portfolio Manager, Oxbow Advisors, LLC, 2011-2023

ITEM 3 - DISCIPLINARY INFORMATION

Alexander Pierce has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Alexander Pierce 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. Alexander Pierce is an equity owner in the parent company of the firm. Mr. Pierce 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Alexander Pierce's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

BRIANA G. GONZALES

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Briana G. Gonzales, Associate Wealth Advisor, b. 2001

Education:
MBA, Business, Grand Canyon University
BS, Marketing and Advertising, Grand Canyon University

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Client Service Associate, Beacon Pointe Advisors, LLC, 2024-2026
Admin, Whiterock Wealth Management, 2024-2024
Store Manager, Free People, 2024-2024
Store Manager, Grand Canyon University, 2022-2024
Sales Associate, Muse Apparel, 2021-2022
Instagram Manager, Salty Lash, 2021-2022
Student, Grand Canyon University, 2019-2022

ITEM 3 - DISCIPLINARY INFORMATION

Briana Gonzales has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Briana Gonzales 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. Gonzales 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.

Kevin Tehan, Partner, Senior Wealth Advisor, is generally responsible for supervising Briana Gonzales' day-to-day advisory activities. Mr. Tehan can be reached by calling 214-691-4451.

BRYAN C. JACKSON, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Bryan C. Jackson, CFP®, Senior Wealth Advisor**,** b. 1974

Education:
BBS, Business Management, James Madison University

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present
Registered Representative, Purshe Kaplan Sterling Investments, 2023-Present
Agent, Beacon Pointe Insurance Services, LLC, 2022-Present
Investment Advisor Representative, VisionPoint Advisory Group, 2016-2022
Registered Representative, LPL Financial, LLC, 2016-2022

Professional Designations

Bryan Jackson 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

Bryan Jackson has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

Bryan Jackson spends a portion of his time as a Registered Representative of Purshe Kaplan Sterling Investments, a non-affiliated registered broker-dealer. In this capacity, Bryan Jackson may make security recommendations, offer investment products and faciliate securities transactions. When effecting transactions, Bryan Jackson is eligible to receive compensation, commissions and/or trailing 12b-1 fees from Purshe Kaplan Sterling Investments for products held by BPA's advisory clients. This type of transaction-related compensation creates a conflict of interest, giving Bryan Jackson an incentive to recommend investment products based on the additional compensation received.

BPA will not charge advisory fees on the portion of the client's portfolio that includes investment products for which Bryan Jackson receives commissions and/or trailing 12b-1 fees. In all instances, BPA will ensure that BPA clients are provided with a disclosure that outlines the commissions and/or trailing 12b-1 fees that Bryan Jackson receives.

In addition to his role with Beacon Pointe Advisors, LLC, Bryan Jackson owns a consulting company entitled Ellison Christopher, LLC. He receives compensation as an employee benefits consultant specializing in health benefits. This other business activity accounts for less than 10% of Mr. Jackson's time.

ITEM 5 - ADDITIONAL COMPENSATION

Bryan Jackson'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. Jackson 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 Bryan Jackson 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Bryan Jackson's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

CONNOR PEARL

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Connor Pearl, Associate Wealth Advisor**,** b. 1994

Education:
MS, Finance, Southern Methodist University
BS, Financial Economics, Southern Methodist University

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Mortgage Lender Office, Luminate Bank, 2022-2023
Mortgage Lender Office, Gateway First Bank, 2021-2022
Home Mortgage Associate, Wells Fargo Bank, 2020-2021

ITEM 3 - DISCIPLINARY INFORMATION

Connor Pearl has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Connor Pearl 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. Pearl 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Connor Pearl's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

DANIEL M. DEANDA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel M. DeAnda, Associate Wealth Advisor**,** b. 1998

Education:
BA, Communication, Texas A&M University

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Agent, Beacon Pointe Insurance Services, LLC, 2026-Present
Investment Advisor, MGB Wealth Management, LLC, 2024-2026
Service Associate, MGB Wealth Management, LLC, 2022-2024
Registered Representative, Purshe Kaplan Sterling Investments, 2021-2022
Registered Representative, Thrivent Advisor Network d/b/a 49 Financial, 2021-2022
Registered Representative, 49 Financial, 2021-2022

ITEM 3 - DISCIPLINARY INFORMATION

Daniel DeAnda has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

Daniel DeAnda 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. DeAnda 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 Daniel DeAnda 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Daniel DeAnda's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

EMERALD E. HENSLEY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Emerald E. Hensley, CFP®, Senior Financial Planner**,** b. 1994

Education:
MS, Personal Financial Planning, Texas Tech University

Business Background:
Senior Financial Planner, Beacon Pointe Advisors, LLC, 2023-Present
Associate Financial Planner, SFMG Wealth Advisors, 2021-2023
Senior Financial Planner, Plancorp LLC, 2020-2021

Professional Designations

Emerald Hensley 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

Emerald Hensley has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Emerald Hensley 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. Hensley 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Emerald Hensley's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

HUNTER K. HARDY, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Hunter K. Hardy, CFP®, Senior Wealth Advisor**,** b. 1960

Education:
BA, Finance, Southwestern University

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Agent, Beacon Pointe Insurance Services, LLC, 2026-Present
President, Advisor, InvestmentHunter Wealth Services, 2008-2026

Professional Designations

Hunter Hardy 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

Hunter Hardy has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

ITEM 5 - ADDITIONAL COMPENSATION

Hunter Hardy'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. Hardy 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 Hunter Hardy 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Hunter Hardy's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

KEVIN R. TEHAN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kevin R. Tehan, Partner, Senior Wealth Advisor**,** b. 1990

Education:
BA, Economics, University of Texas at Dallas

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Vice President, WhiteRock Wealth Management Co., 2016-2024

ITEM 3 - DISCIPLINARY INFORMATION

Kevin Tehan has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Kevin Tehan 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. Kevin Tehan is an equity owner in the parent company of the firm. Mr. Tehan 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Kevin Tehan's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

LESLIE R. ANCONA, CFP®, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Leslie R. Ancona, CFP®, CFA, Partner, Senior Wealth Advisor**,** b. 1989

Education:
BBA, Finance, Southern Methodist University
BA, Spanish, Southern Methodist University

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2021-Present
Wealth Management & 401(K) Advisor, Wealthstreet Investment Advisors, LLC, 2017-2021

Professional Designations

Leslie Ancona 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

Leslie Ancona has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Leslie Ancona 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. Leslie Ancona is an equity owner in the parent company of the firm. Ms. Ancona 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Leslie Ancona's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

MATTHEW C. THOMPSON

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew C. Thompson, Principal, Senior Wealth Advisor**,** b. 1982

Education:
BA, Real Estate Finance, Southern Methodist University

Business Background:
Principal, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Principal, Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-2026
Wealth Manager, WhiteRock Wealth Management Co., 2021-2024
Real Estate Broker, Lee & Associates, LLC, 2015-2021

ITEM 3 - DISCIPLINARY INFORMATION

Matthew Thompson has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew Thompson 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 Thompson'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. Thompson 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Matthew Thompson's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

MICHAEL G. BAILEY

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael G. Bailey, Senior Wealth Advisor**,** b. 1961

Education:
BBA, Southern Methodist University

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Agent, Beacon Pointe Insurance Services, LLC, 2026-Present
Investment Adviser, CCO, MGB Wealth Management, LLC, 2020-2026

ITEM 3 - DISCIPLINARY INFORMATION

Michael Bailey 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. Bailey please visit: https://adviserinfo.sec.gov/

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

In addition to Michael Bailey's role with Beacon Pointe Advisors, LLC, he serves as Manager of B.B.W.M. Lease Partners, LLC. This activity accounts for a de minimis amount of Michael Bailey'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

Michael Bailey'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. Bailey 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 Michael Bailey 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Michael Bailey's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

MICHAEL R. BECK

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael R. Beck, Partner, Managing Director**,** b. 1959

Education:
BA, Economics and Business Administration, Vanderbilt University

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present
Managing Director, Portfolio Manager, Wealthstreet Investment Advisors, LLC, 2017-2021

ITEM 3 - DISCIPLINARY INFORMATION

Michael Beck has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael Beck 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 Beck 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. Michael Beck is an equity owner in the parent company of the firm. Mr. Beck 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, Michael Beck oversees the investment advisory services provided by Beacon Pointe Advisors' Dallas, 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.

MICHAEL H. KANE, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael H. Kane, CFA, Partner, Managing Director, b. 1964

Education:
MBA, Southern Methodist University
BS, Finance, Babson College

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2021-Present
Managing Director, Portfolio Manager, Wealthstreet Investment Advisors, LLC, 2017-2021

Professional Designations

Michael Kane 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

Michael Kane has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, Michael Kane serves as a member on the Investment Committee for the Dallas Jewish Community Foundation, and as a trustee on the Board of Trustees for Legacy Senior Communities. This activity accounts for a de minimis amount of Michael Kane'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

Michael Kane 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. Michael Kane is an equity owner in the parent company of the firm. Mr. Kane 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 Michael Kane 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, Michael Kane oversees the investment advisory services provided by Beacon Pointe Advisors' Dallas, 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.

MICHELLE HOLAREN

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michelle Holaren, Associate Wealth Advisor**,** b. 1990

Education:
BS, Biological Sciences, Arizona State University

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-Present
Client Service Associate, Beacon Pointe Advisors, LLC, 2022-2023
Brokerage Client Assistant, Wells Fargo Advisors, 2021-2022
PB Client Associate II, Wells Fargo Private Bank, 2020-2021

ITEM 3 - DISCIPLINARY INFORMATION

Michelle Holaren has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Michelle Holaren 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. Holaren 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Michelle Holaren's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

MILES B. BECK

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Miles B. Beck, Associate Wealth Advisor, b. 1995

Education:
BS, Economics, University of Denver

Business Background:
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Stock Broker, Charles Schwab, 2021-2025
Banker, JP Morgan Chase, 2020-2021

ITEM 3 – DISCIPLINARY INFORMATION

Miles Beck has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Miles Beck 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. Beck 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Miles Beck's day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.

PETER CURTIS, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Peter Curtis, CFP®, Wealth Advisor, b. 1989

Education:
MA, Public and International Affairs, University of Pittsburg
BA, Government, Harvard College

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2025-Present
Associate Wealth Advisor, Beacon Pointe Advisors, LLC, 2023-2025
Associate Advisor, Greycourt & Co., Inc., 2020-2022

Professional Designations

Peter Curtis 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

Peter Curtis has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Peter Curtis' 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. Curtis 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.

Michael Beck, Partner, Managing Director, is generally responsible for supervising Peter Curtis' day-to-day advisory activities. Mr. Beck can be reached by calling 214-954-1900.