Form ADV
Part 2B Brochure Supplement

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www.beaconpointe.com

Office Locations:

10700 Research Drive, Suite 150
Milwaukee, WI 53226
414-257-4248

8383 Greenway Boulevard, Suite 600
Middleton, WI 53562
414-257-4248

509 McMillen Street
Fort Atkinson, WI 53538
920-568-3601

Corporate Office:

24 Corporate Plaza Drive, Suite 150
Newport Beach, CA 92660
949-718-1600

This brochure supplement provides information about the individuals listed in the Table of Contents who are supervised persons of Beacon Pointe Advisors, LLC. You should have already received a copy of that brochure. Please contact us at 949-718-1600 if you did not receive our brochure or if you have any questions about the contents of this supplement.

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

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BRIAN A. BENGRY

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brian A. Bengry, Senior Wealth Advisor, b. 1975

Education:
BBA, Business Administration & Finance, University of Wisconsin-Milwaukee

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2024-Present
Senior Wealth Advisor, Conscious Capital Management LLC, 2011-2024

ITEM 3 - DISCIPLINARY INFORMATION

Brian Bengry has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Brian Bengry 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. Bengry 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.

David Massart, Partner, Managing Director, is generally responsible for supervising Brian Bengry's day-to-day advisory activities. Mr. Massart can be reached by calling 414-257-4248.

CHRISTINE D. BRUMFIELD, CFP®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christine D. Brumfield, CFP®, Partner, Senior Wealth Advisor, b. 1968

Education:
BBA, Cardinal Stritch University
AA, Marketing, Waukesha County Technical College

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Wealth Advisor, Senior Vice President, 1834 Investment Advisors Co., 2025-2026
Wealth Advisor, Senior Vice President, Old National Bank, 2023-2026
Private Banker, Senior Vice President, Wisconsin Bank and Trust, 2021-2023

Professional Designations

Christine Brumfield 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

Christine Brumfield has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Christine Brumfield 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. Christine Brumfield is an equity owner in the parent company of the firm. Ms. Brumfield 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.

David Massart, Partner, Managing Director, is generally responsible for supervising Christine Brumfield's day-to-day advisory activities. Mr. Massart can be reached by calling 414-257-4248.

DAVID A. MASSART

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David A. Massart, Partner, Managing Director, b. 1967

Education:
BS, Business, University of Minnesota

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2022-Present
Founding Partner, President, Next Generation Wealth Management, Inc., 2005-2021

ITEM 3 - DISCIPLINARY INFORMATION

David Massart has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to his role with Beacon Pointe Advisors, LLC, David Massart serves as a trustee of the Managed Portfolio Series Trust (the "Trust"), a Delaware statutory trust registered with the SEC as an open-end management investment company, and as a director for each series fund in the Trust (each a "Fund"). He also serves as a trustee of the ETF Series Solutions Trust (the "Trust"), a Delaware statutory trust registered with the SEC as an open-end management investment company, and as a director for each series ETF in the Trust (each an "ETF").

Beacon Pointe affiliate, Port Street Investments, LLC, is the investment adviser to the Port Street Quality Growth Fund, a fund in the Managed Portfolio Series Trust. To mitigate the conflict, Mr. Massart abstains from voting on Port Street matters in his role as a trustee of the Trust. Additionally, Mr. Massart is not involved in the management of Port Street Investments, nor does he have any direct or indirect ownership of Port Street Investments.

ITEM 5 - ADDITIONAL COMPENSATION

David Massart 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. David Massart is an equity owner in the parent company of the firm. Mr. Massart 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 David Massart 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, David Massart oversees the investment advisory services provided by Beacon Pointe Advisors' Milwaukee, Wisconsin 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.

HEATHER R. SCHABER

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Heather R. Schaber, Senior Client Service Associate, b. 1982

Education:
AAB, Business Management, Eastern Gateway Community College

Business Background:
Senior Client Service Associate, Beacon Pointe Advisors, LLC, 2022-Present
House Manager, Aoy Mitchell, 2016-2022

ITEM 3 - DISCIPLINARY INFORMATION

Heather Schaber has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Heather Schaber 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. Schaber 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.

David Massart, Partner, Managing Director, is generally responsible for supervising Heather Schaber's day-to-day advisory activities. Mr. Massart can be reached by calling 414-257-4248.

JEFFREY W. KRALOVEC

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jeffrey W. Kralovec, Senior Relationship Manager, b. 1971

Education:
BA, Economics, Rippon College

Business Background:
Senior Relationship Manager, Beacon Pointe Advisors, LLC, 2022-Present
Senior Vice President, Next Generation Wealth Management, Inc., 2009-2021
Chief Compliance Officer, Next Generation Wealth Management, Inc., 2007-2021

ITEM 3 - DISCIPLINARY INFORMATION

Jeffrey Kralovec has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Jeffrey Kralovec 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. Kralovec 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.

David Massart, Partner, Managing Director, is generally responsible for supervising Jeffrey Kralovec's day-to-day advisory activities. Mr. Massart can be reached by calling 414-257-4248.

MARK A. MEIER, CFP®, CIMA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark M. Meier, CFP®, CIMA®, Partner, Senior Wealth Advisor, b. 1968

Education:
MBA, University of Notre Dame
BBA, Finance, University of Wisconsin Whitewater

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Investment Advisor Representative, Advisory Services Network, LLC, 2020-2026

Professional Designations

Mark Meier 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 Analyst (CIMA®)

The CIMA® designation is issued by the Investments and Wealth Institute (formerly IMCA). To earn each certification, each CIMA® candidate must complete a self-study program, attend a one-week classroom education program provided by an Association to Advance Collegiate Schools of Business ("AACSB") accredited university business school, pass an online examination after self-study and an on-line comprehensive certification examination after meeting all requirements of a registered classroom education program and also complete a minimum of 30 hours of continuing education every two years. More information about the CIMA® is available at https://investmentsandwealth.org/home.

ITEM 3 - DISCIPLINARY INFORMATION

Mark Meier has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Mark Meier 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 Meier'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. Meier 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, Senior Wealth Advisor at Beacon Pointe Advisors, LLC, Mark Meier oversees the investment advisory services provided by Beacon Pointe Advisors' Fort Atkinson, WI 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 J. WEIL, CFP®, CIMA®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael J. Weil, CFP®, CIMA®, Senior Wealth Advisor, b. 1962

Education:
BBA, Business Administration & Finance, University of Wisconsin-Milwaukee

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2022-Present
Director of Wealth Management, Next Generation Wealth Management, Inc., 2013-2021

Professional Designations

Michael Weil 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 Analyst (CIMA®)

The CIMA® designation is issued by the Investments and Wealth Institute (formerly IMCA). To earn each certification, each CIMA® candidate must complete a self-study program, attend a one-week classroom education program provided by an Association to Advance Collegiate Schools of Business ("AACSB") accredited university business school, pass an online examination after self-study and an on-line comprehensive certification examination after meeting all requirements of a registered classroom education program and also complete a minimum of 30 hours of continuing education every two years. More information about the CIMA® is available at https://investmentsandwealth.org/home.

ITEM 3 - DISCIPLINARY INFORMATION

Michael Weil has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael Weil 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 Weil'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. Weil 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.

David Massart, Partner, Managing Director, is generally responsible for supervising Michael Weil's day-to-day advisory activities. Mr. Massart can be reached by calling 414-257-4248.