Form ADV
Part 2B Brochure Supplement

November 2026

Individuals covered by this supplement include:

Benjamin Weinberg
Brett N. Rosen
Donald M. Bond
Matthew A. Weinberg
Ryan Babeuf

www.beaconpointe.com

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New York, NY 10022
212-682-0133

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

This brochure supplement provides information about the above listed individuals that supplements the Beacon Pointe Advisors, LLC brochure. 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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BENJAMIN WEINBERG

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Benjamin Weinberg, Wealth Advisor, b. 1996

Education:
BA, English, Tulane University

Business Background:
Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Advisor Associate/Analyst, Edge Wealth Management, LLC, 2020-2026

ITEM 3 – DISCIPLINARY INFORMATION

Benjamin Weinberg has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Benjamin Weinberg'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. Weinberg 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.

Matthew Weinberg, Partner, Managing Director, is generally responsible for supervising Benjamin Weinberg's day-to-day advisory activities. Mr. Weinberg can be reached by calling 212-682-0133.

BRETT N. ROSEN, AEP®, CPWA®, CLU®

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brett N. Rosen, AEP®, CPWA®, CLU®, Partner, Senior Wealth Advisor, b. 1961

Education:
BBA, Accounting, University of Michigan

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Agent, Beacon Pointe Insurance Services, LLC, 2026-Present
Client Relations, Edge Wealth Management, LLC, 2009-2026

Professional Designations

Brett Rosen holds the following professional designations:

Accredited Estate Planner® (AEP®)

The Accredited Estate Planner® (AEP®) designation is a professional credential awarded by the National Association of Estate Planners & Councils (NAEPC). The designation recognizes professionals who have demonstrated advanced knowledge, education, experience, and professional competence in estate planning. The AEP® designation is voluntary and is not required by federal or state law or regulation to provide financial advisory services.

To earn the AEP® designation, candidates must hold an approved professional credential or qualification, such as CFP®, CFA, CPA, or JD, and have at least five years of professional experience, devoting at least one-third of their professional time to estate planning activities. Candidates with fewer than 15 years of qualifying experience must also complete specified graduate-level estate planning coursework. Applicants must obtain three professional references, satisfy applicable estate planning council membership requirements, and agree to adhere to the NAEPC Code of Ethics.

To maintain the designation, AEP® professionals must complete at least 30 hours of continuing education every two years, including 15 hours related to estate planning, and satisfy annual recertification requirements. More information about the AEP® designation is available at https://www.naepc.org.

Certified Private Wealth Advisor (CPWA®)

The Certified Private Wealth Advisor (CPWA®) designation is issued by the Investments and Wealth Institute (formerly IMCA). The CPWA® designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on management topics and strategies for high-net-worth clients. Prerequisites for the CPWA® designation are a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA®, RMA®, CFA®, CFP®, ChFC® or CPA license; acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements; five years of professional client-centered experience in financial services or a related industry; and successfully complete a comprehensive

background check. CPWA® designees must complete a six-month pre-class educational component and a five-day classroom education program through The University of Chicago Booth School of Business. CPWA® designees are required to adhere to the Investments & Wealth Institute's *Code of Professional Responsibility* and the appropriate use of certification marks. CPWA® designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. More information regarding the CPWA is available at https://investmentsandwealth.org/.

Chartered Life Underwriter (CLU®)

The CLU designation is offered by The American College. To earn the credential, the CLU candidate must successfully complete the five required courses and certify compliance with The American College Code of Ethics and Procedures. Participation in the annual Professional Recertification Program is required to maintain the designation. More information about the CLU is available at https://www.theamericancollege.edu.

ITEM 3 – DISCIPLINARY INFORMATION

Brett Rosen has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

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

Brett Rosen is the owner of BR Financial Services, LLC, a life insurance business. This activity accounts for approximately 10–20% of his professional time. Through BR Financial Services, LLC, Brett Rosen may offer insurance products and receive commissions from their sale. This compensation creates an incentive for Brett Rosen to recommend insurance products based on the compensation received rather than solely on the client's needs. Clients are not obligated to purchase any recommended insurance products or to conduct insurance transactions through Mr. Rosen or BR Financial Services, LLC.

Brett Rosen is also a passive shareholder of Foods for Juniors, Inc., which operates restaurants and sells bakery goods through retail, wholesale, and mail-order channels. He has no active role in its management or operations. Foods for Juniors, Inc. is unrelated to Beacon Pointe Advisors, LLC's advisory business.

ITEM 5 - ADDITIONAL COMPENSATION

Brett Rosen 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. Brett Rosen is an equity owner in the parent company of the firm. Mr. Rosen 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 Brett Rosen 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.

Matthew Weinberg, Partner, Managing Director, is generally responsible for supervising Brett Rosen's day-to-day advisory activities. Mr. Weinberg can be reached by calling 212-682-0133.

DONALD M. BOND

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Donald M. Bond, Senior Wealth Advisor, b. 1956

Education:
MA, Economics, University of North Carolina Greensboro
BS, Economics, State University of New York Brockport

Business Background:
Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Senior Financial Advisor, Edge Wealth Management, LLC, 2012-2026

ITEM 3 – DISCIPLINARY INFORMATION

Donald Bond has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

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

ITEM 5 - ADDITIONAL COMPENSATION

Donald Bond'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. Bond 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.

Matthew Weinberg, Partner, Managing Director, is generally responsible for supervising Donald Bond's day-to-day advisory activities. Mr. Weinberg can be reached by calling 212-682-0133.

MATTHEW A. WEINBERG

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew A. Weinberg, Partner, Managing Director, b. 1964

Education:
BA, Philosophy, Brandeis University

Business Background:
Partner, Managing Director, Beacon Pointe Advisors, LLC, 2026-Present
Principal, Edge Wealth Management, LLC, 2006-2026

ITEM 3 – DISCIPLINARY INFORMATION

Matthew Weinberg has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew Weinberg 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 Weinberg 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. Matthew Weinberg is an equity owner in the parent company of the firm. Mr. Weinberg 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, Matthew Weinberg oversees the investment advisory services provided by Beacon Pointe Advisors' New York, New York 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.

RYAN BABEUF, CFA

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ryan Babeuf, CFA, Partner, Senior Wealth Advisor, b. 1985

Education:
BS, Business Administration, Fordham University

Business Background:
Partner, Senior Wealth Advisor, Beacon Pointe Advisors, LLC, 2026-Present
Strategist, Financial Advisor, Edge Wealth Management, LLC, 2007-2026

Professional Designations

Ryan Babeuf 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

Ryan Babeuf has no disciplinary history to disclose.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Ryan Babeuf 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 Babeuf 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. Ryan Babeuf is an equity owner in the parent company of the firm. Mr. Babeuf 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.

Matthew Weinberg, Partner, Managing Director, is generally responsible for supervising Ryan Babeuf's day-to-day advisory activities. Mr. Weinberg can be reached by calling 212-682-0133.