

Beacon Pointe Advisors

An Independent Investment
Advisory Firm

Tiburon Written Research
September 1, 2012



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (and Related WealthTech) Firms

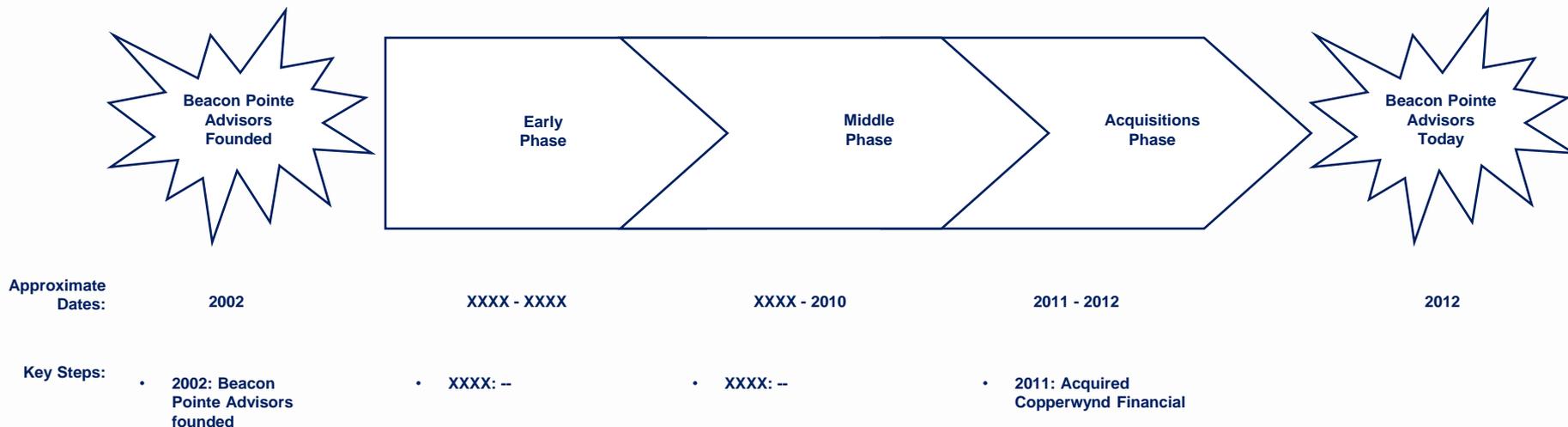


Comments

- **Founded in 2002**
- **Based in Newport Beach, CA**
- **CEO: Garth Flint**
- **286 accounts**
- **\$4.0 billion assets under management**
- **Web site: www.bpadvisor.com**

Beacon Pointe Advisors was Founded in 2002 and Has Subsequently Evolved through Three Phases, Including its Early, Middle, & Acquisitions Phases

Beacon Pointe Advisors History



Beacon Pointe Advisors was Founded in 2002



Comments

- **Founded in 2002**
- **Based in Newport Beach, CA**
- **CEO: Garth Flint**

Beacon Pointe Advisors Has Acquired at Least One Firm, Including Copperwynd Financial in 2011

Beacon Pointe Advisors Acquisitions

Meyer used Cambridge Investment Research as Independent Broker/Dealer

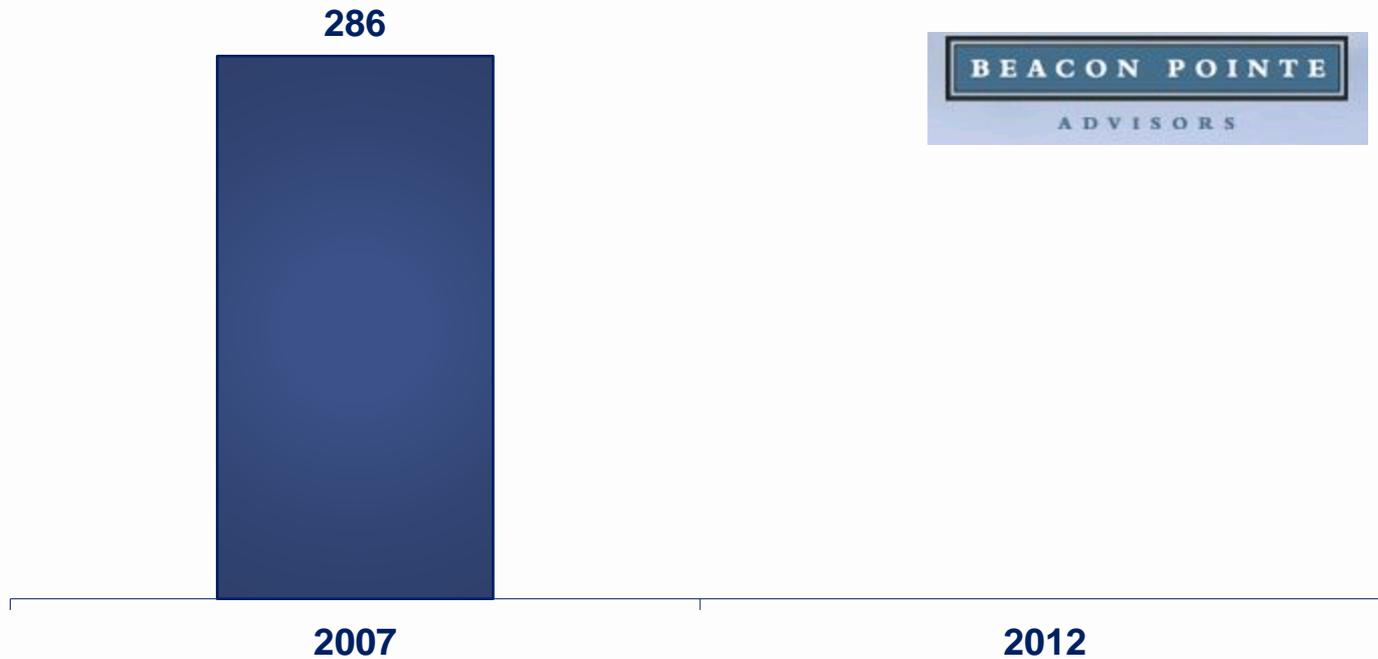
Copperwynd Financial	--	--	--
<ul style="list-style-type: none"> • Based in Scottsdale, AZ • \$125 million assets under management • CEO: Bruce Meyer • Acquired in 2001 <ul style="list-style-type: none"> – Rebranded Beacon Pointe Wealth Advisors - Arizona 	<ul style="list-style-type: none"> • -- 	<ul style="list-style-type: none"> • -- 	<ul style="list-style-type: none"> • -- <div data-bbox="1483 1159 1798 1239" style="text-align: center; margin-top: 20px;">  <p>BEACON POINTE ADVISORS</p> </div>

Source: 3/3/11 RIA Biz; 3/3/11 Practice Management Letter; Tiburon Research & Analysis

Beacon Pointe Advisors Has 286 Accounts

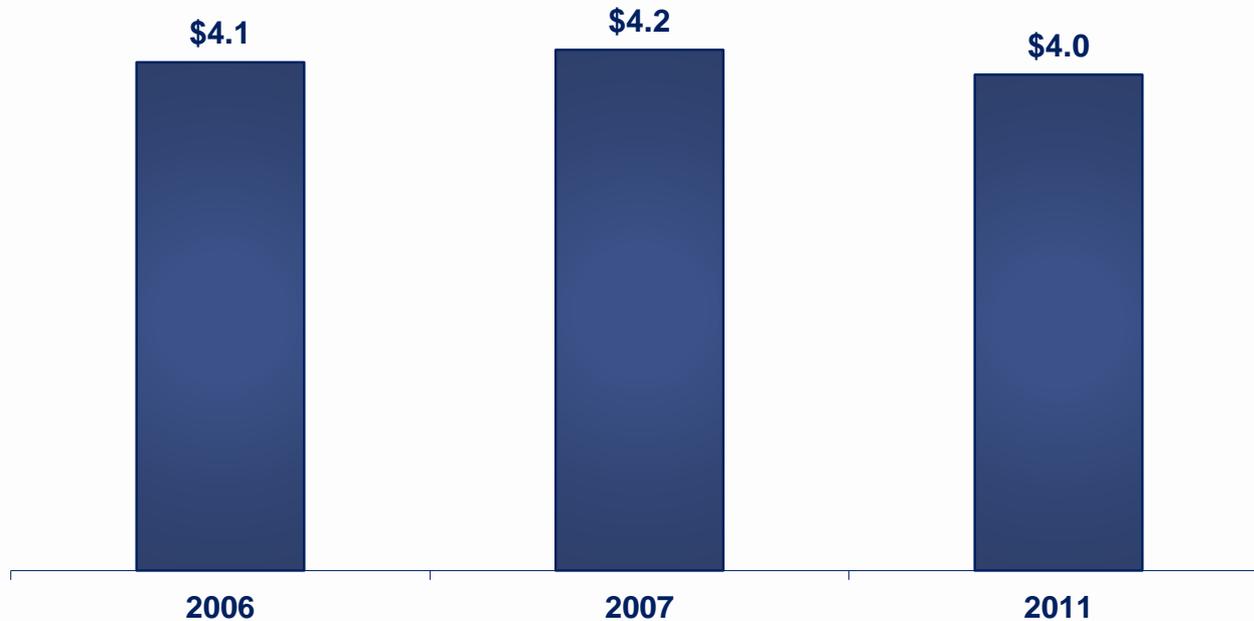
Needs update

Beacon Pointe Advisors Accounts



Beacon Pointe Advisors Has \$4.0 Billion Assets Under Management, Relatively Steady Since 2006

Beacon Pointe Advisors Assets Under Management (\$ Billions)

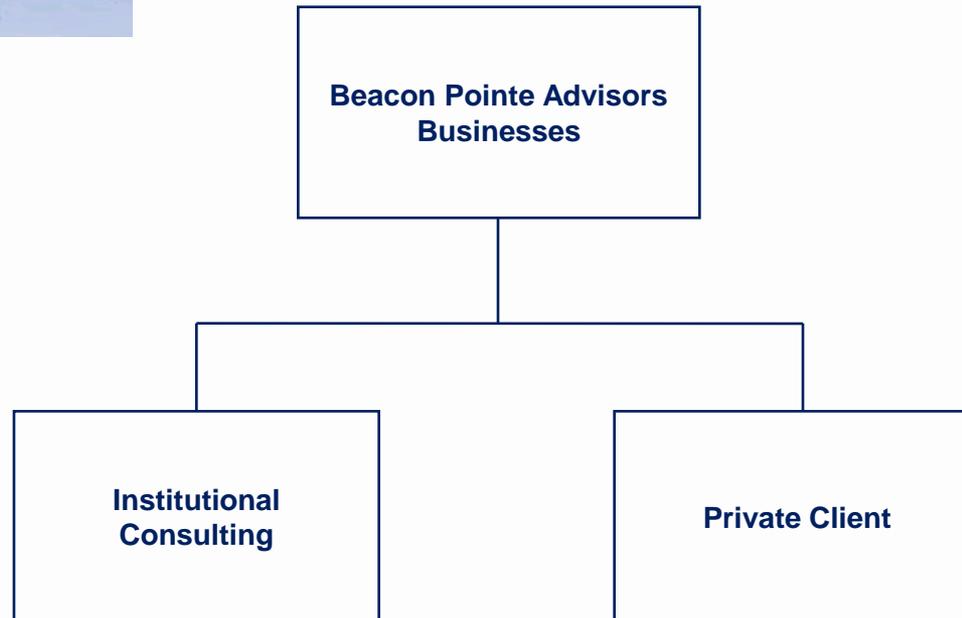


Source: 3/3/11 RIA Biz; 3/3/11 Practice Management Letter; 6/08 Registered Rep; Tiburon Research & Analysis

Beacon Pointe Advisors Has Two Core Businesses, Including Institutional Consulting & Private Client

Beacon
Financial
Advisors =
private client?

Beacon Pointe Advisors Businesses



Beacon Pointe Advisors' First Business is Institutional Consulting

Comments

- --



Beacon Pointe Advisors' Second Business is Private Client



Comments
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Comments

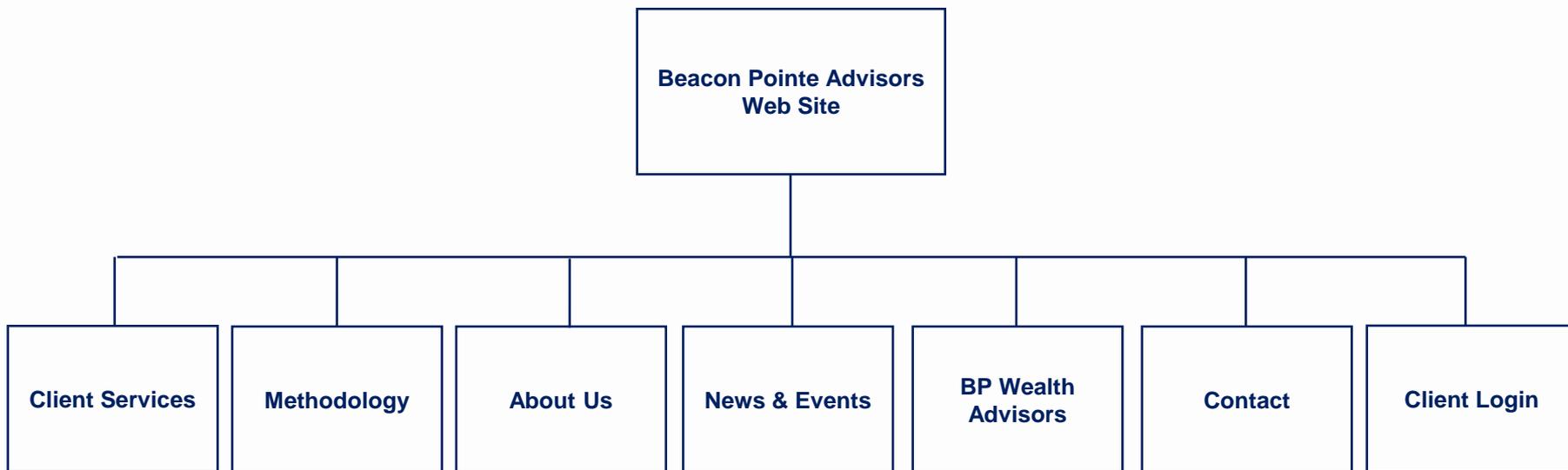
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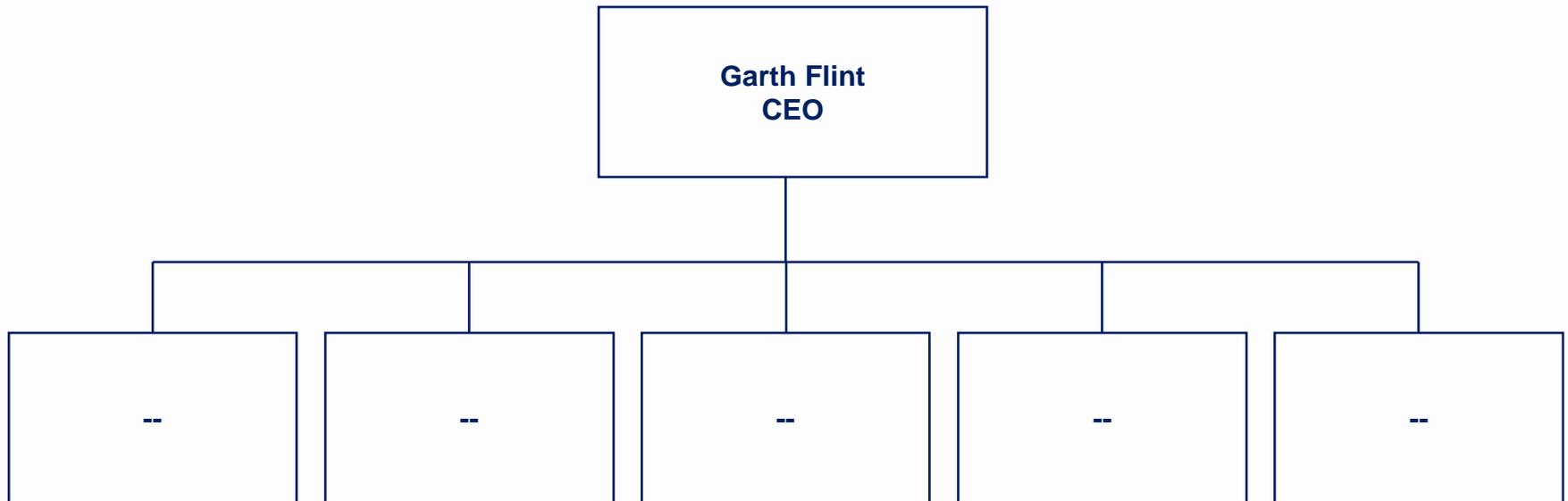
Beacon Pointe Advisors Web Site



Beacon Pointe Advisors is Led by its CEO Garth Flint

Matthew
Cooper?

Beacon Pointe Advisors Organizational Chart





Comments

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