

# 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](http://www.bpadvisor.com)**

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

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## **Beacon Pointe Advisors Acquisitions**

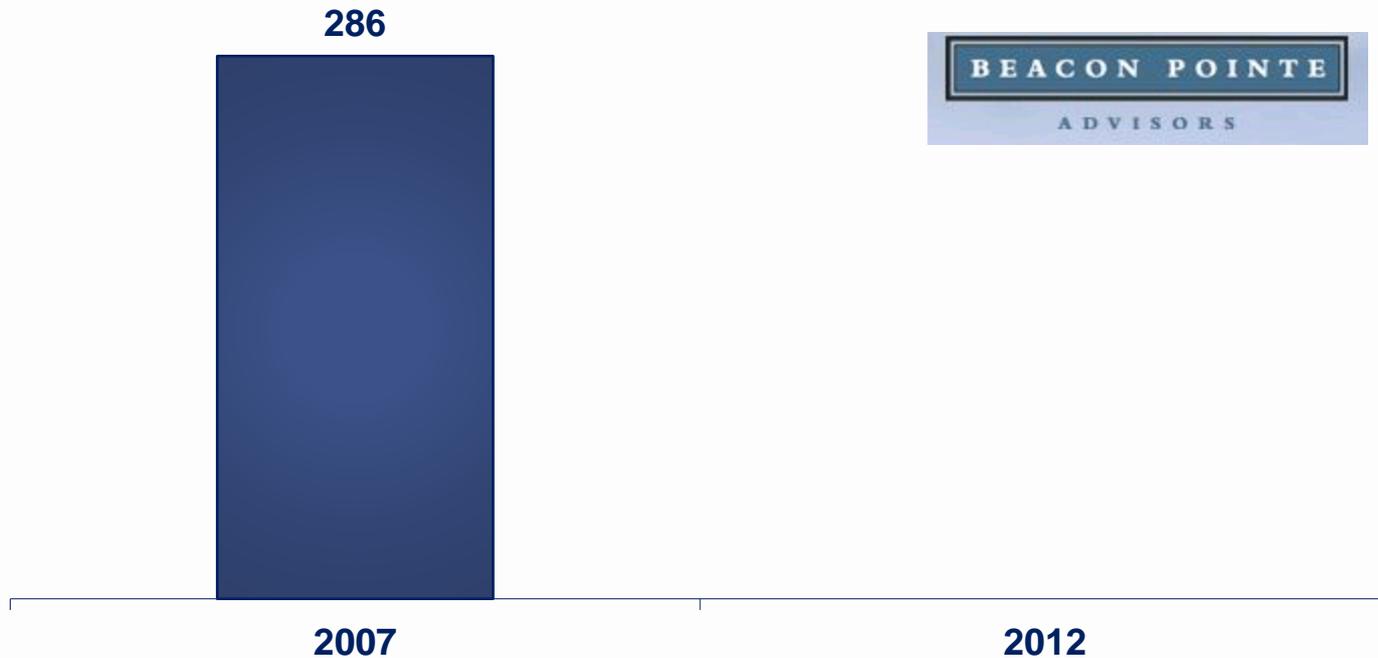
<p><b>Copperwynd Financial</b></p>	<p>--</p>	<p>--</p>	<p>--</p>
<ul style="list-style-type: none"> <li>• Based in Scottsdale, AZ</li> <li>• \$125 million assets under management</li> <li>• CEO: Bruce Meyer</li> <li>• Acquired in 2001             <ul style="list-style-type: none"> <li>– Rebranded Beacon Pointe Wealth Advisors - Arizona</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• --</li> </ul>	<ul style="list-style-type: none"> <li>• --</li> </ul>	<ul style="list-style-type: none"> <li>• --</li> </ul> <div data-bbox="1483 1159 1800 1239" style="text-align: center; border: 1px solid black; padding: 5px; margin-top: 20px;"> <p><b>BEACON POINTE</b> ADVISORS</p> </div>

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

# Beacon Pointe Advisors Has 286 Accounts

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## Beacon Pointe Advisors Accounts

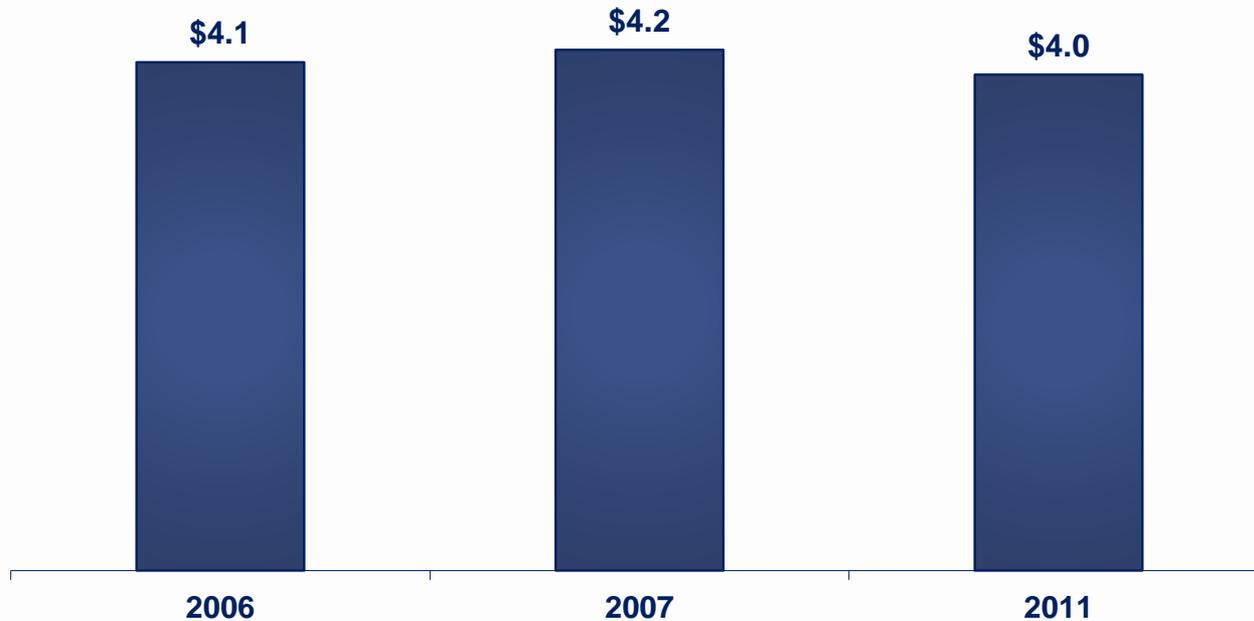


Source: 6/08 Registered Rep; Tiburon Research & Analysis

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

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## **Beacon Pointe Advisors Assets Under Management (\$ Billions)**

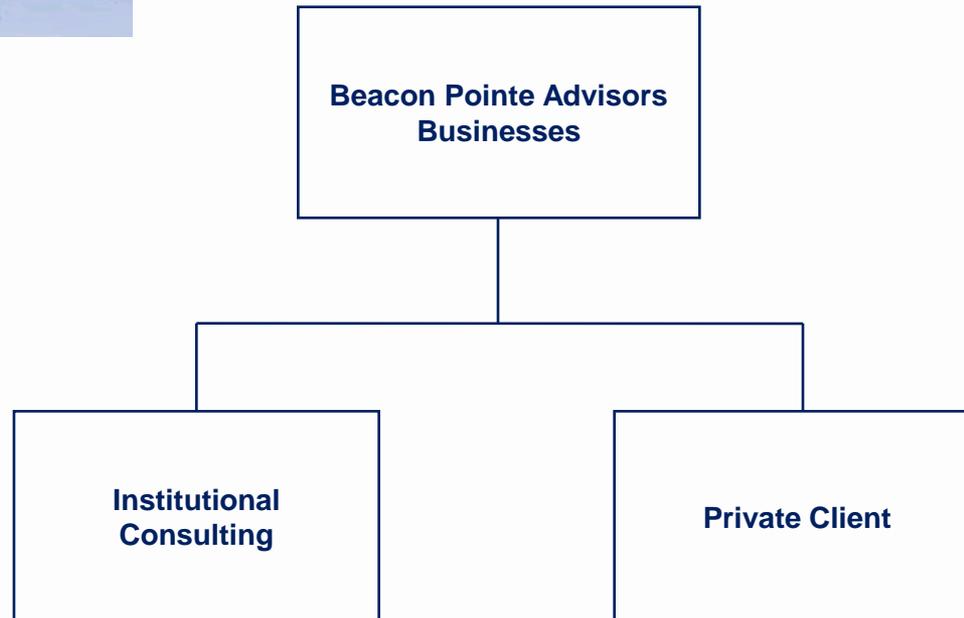


Source: 3/3/11 RIA Biz; 3/3/11 Practice Management Letter; 6/08 Registered Rep; Tiburon Research & Analysis

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

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## **Beacon Pointe Advisors Businesses**



# Beacon Pointe Advisors' First Business is Institutional Consulting

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Comments
<ul style="list-style-type: none"><li>• --</li></ul>

# Beacon Pointe Advisors' Second Business is Private Client

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## Comments

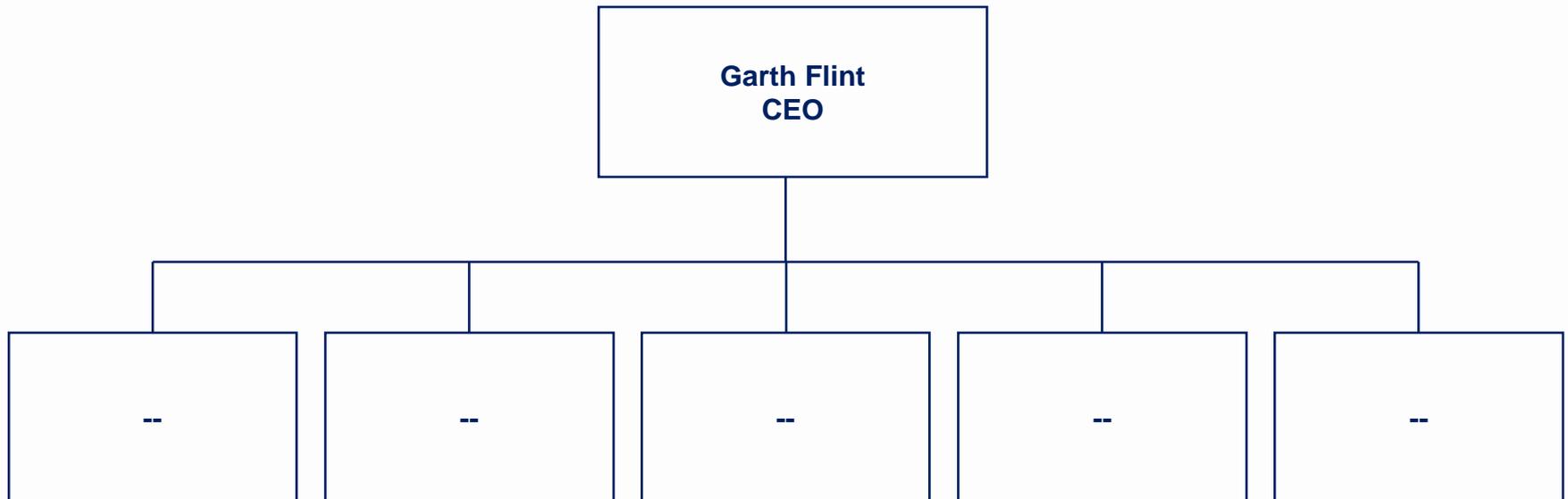
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# Beacon Pointe Advisors is Led by its CEO Garth Flint

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## Beacon Pointe Advisors Organizational Chart





## Comments

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