



Wrap Fee Program Brochure

This brochure provides information about the qualifications and business practices of Beacon Financial Advisory LLC. If you have any questions about the contents of this brochure, please contact us at (216) 910-1850 or by email at: info@beaconplanners.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Beacon Financial Advisory LLC is also available on the SEC's website at www.adviserinfo.sec.gov. Beacon Financial Advisory LLC's CRD number is: 174334

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Registration does not imply a certain level of skill or training.

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Item 2: Material Changes

The material changes in this brochure from the last annual updating amendment of Beacon Financial Advisory LLC on 03/15/2025, are described below. Material changes relate to Beacon Financial Advisory LLC's policies, practices or conflicts of interests.

Section B

- The firm no longer has any Investment Adviser Representatives operating under Pistone Wealth Advisors or Beacon CFO.
- The firm has added Tropp O'Toole James Private Wealth Management as a DBA for our Investment Adviser Representatives.
- The firm no longer has Investment Adviser Representatives acting as accountants from Costin & Kendall CPAs.

Item C

- TD Ameritrade has been removed as a custodian of the Firm.