

**SUPERVISED PERSON BROCHURE**  
FORM ADV PART 2B

Rachel L. Rosio

**Beacon Wealth Advisors, LLC**

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This brochure supplement provides information about Rachel Rosio and supplements Beacon Wealth Advisors, LLC's brochure. You should have received a copy of that brochure. Please contact Rachel Rosio if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Rachel Rosio (CRD# 7150754) is available on the SEC's website at <http://www.adviserinfo.sec.gov>.

**MAY 12, 2021**

## Brochure Supplement (Part 2B of Form ADV)

### Supervised Person Brochure

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Rachel L. Rosio

- Year of birth: 1996
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#### Item 2 Educational Background and Business Experience

Educational Background:

- University of Wisconsin-Milwaukee; Business; Attended 01/2017 – 04/2018
- Kettering University; Mechanical Engineering; Attended 07/2015 – 12/2016

Business Experience:

- Beacon Insurance Advisors, LLC; Insurance Agent; 03/2021 - Present
  - Beacon Wealth Advisors, LLC; Investment Advisor Representative; 10/2020 – Present
  - Beacon Wealth Advisors, LLC; Operations Assistant; 07/2019 – 10/2020
  - Lane Bryant; Service Manager; 01/2018 – 07/2019
  - Full Time Student; Student; 10/2010 – 04/2018
  - Crandall's Family Restaurant; Hostess; 07/2017 – 01/2018
  - Harvard State Bank; Seasonal Teller; 06/2017 – 09/2017
  - General Motors; Co-op Student; 10/2015-12/2016
  - Subway; Sandwich Artist; 09/2013 – 06/2015
  - Crandall's Family Restaurant; Busser; 08/2014 – 02/2015
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#### Item 3 Disciplinary Information

None to report.

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#### Item 4 Other Business Activities

Rachel Rosio is a licensed insurance agent. From time to time, she will offer clients advice or products in that capacity. Approximately 20% of her time is spent on insurance services. Ms. Rosio receives commissions on the insurance products she sells.

These practices represent conflicts of interest because it gives an incentive to recommend products based on the commission/fee amount received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the interests of the client first and clients are not required to purchase any products or services. Clients have the option to purchase these products through another insurance agent of their choosing.

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#### Item 5 Additional Compensation

Rachel Rosio receives separate yet typical compensation in her role as an insurance agent, but she does not receive any performance based fees.

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#### Item 6 Supervision

Rachel Rosio is supervised by Chris Morgan, Chief Compliance Officer of Beacon Wealth Advisors, LLC. He reviews Rachel Rosio's work through client reviews, quarterly personal transaction reports as well as face-to-face and phone interactions. Chris Morgan can be reach by email [chris@mybeaconadvisors.com](mailto:chris@mybeaconadvisors.com) or (815) 385-3899.