

Item 1. **COVER PAGE**

Brochure Supplement

(Part 2B of Form ADV)

William (Bill) S. Rogers

Investment Adviser Representative



**751 Cool Springs Blvd., Suite 106
Franklin, Tennessee 37067
Telephone: 615-224-9794
(CRD# 156228)**

Email: Bill@beaconcm.com

This Brochure Supplement (the “**Supplement**”) provides information about the supervised person identified herein, an Investment Adviser Representative (“**IAR**”) of Beacon Capital Management, LLC (“**Beacon**” and/or the “**Firm**”), that supplements the Firm’s Form ADV Part 2A (the “**Brochure**”). Please contact Ms. Jaimie Palmer, the Chief Compliance Officer of Beacon at 615-224-9794, if you did not receive the Brochure or if you have any questions about the content of this Supplement.

The information in this Supplement has not been approved or verified by the United States Securities and Exchange Commission (the “**SEC**”) or by any state securities authority. Additional information about all Supervised Person is available on the SEC’s website at www.adviserinfo.sec.gov. You can search this website by using the IAR’s CRD number referenced above.

July 2025

William (Bill) S. Rogers, Investment Adviser Representative

- **CRD No.** 4329395
- **Born:** 1980

Item 2. EDUCATIONAL AND BUSINESS EXPERIENCE

Generally, Beacon, requires employees to have relevant work experience in the securities industry. Any employee of Beacon acting in an IAR capacity will be appropriately licensed as such.

Education Background:

- Mr. Rogers does not have any advanced degrees

Business Experience:

- **Investment Adviser Representative** (2016 – Present)
Beacon Capital Management, LLC, Franklin, TN
- **Registered Securities Representative** (2014 – 2017)
- **Investment Adviser Representative** (2005 – 2016)
Kalos Capital, Inc., Alpharetta, GA
- **Project Manager/Construction** (2013 – 2014)
Gaston Restorations, Jacksonville, FL
- **Registered Securities and Investment Adviser Representative** (2012 – 2013)
Investors Capital Advisory, Ashville, NC
- **Remote Project Manager/Construction** (2010 – 2012)
Gaston Restorations, Jacksonville, FL
- **Investment Services** (2010 – 2012)
Bank of America, Jacksonville, FL
- **Registered Securities Representative** (2001 – 2008) & (2009 – 2010)
- **Investment Adviser Representative** (2006 – 2008) & (2009 – 2010)
Merrill Lynch, Pierce, Fenner & Smith, Inc., Jacksonville, FL

Licenses/Certifications:

- **State Securities Exams**
Series 66 – Uniform Combined State Examination (2006)
- **General Industry/Products Exam**
SIE – Securities Industry Essential Examination (2017)
Series 6 – Investment Company Products/Variable Contracts Representative Examination (2001 – Inactive)
Series 7 – General Securities Representative Examination (2006 - Inactive)
- **Insurance License** (2016)
Tennessee, State Board Systems – Insurance Producer

Item 3. **DISCIPLINARY INFORMATION**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4. **OTHER BUSINESS ACTIVITIES**

Mr. Rogers has been a licensed insurance agent since 2016. In his separate capacity as an insurance agent, Mr. Rogers may suggest you implement recommendations of Beacon Insurance & Life, LLC (“Beacon Insurance”), a wholly owned affiliated of the Firm, by purchasing disability insurance, life insurance, annuities, or other insurance products. He approximately spends about 20% of his time on these activities. From time to time, he may offer clients advice or products from those activities and Beacon Insurance will earn compensation for him selling such insurance products, including insurance products he sells to you. Compensation earned by Beacon Insurance for these products is separate from the advisory fees the Firm receives from you.

These practices may present a conflict of interest because it gives the Firm, through Beacon Insurance, an incentive to recommend products based on the compensation amount received. This conflict is mitigated by the fact that Beacon has adopted a code of ethics that requires all associated persons to place the interests of clients first. We will explain the specific costs associated with any recommended insurance products and investments with you. Additionally, you have the option to purchase insurance products through other brokers or agents who are not affiliated with us. You are not required to do business with Mr. Rogers in any of these capacities.

Item 5. **ADDITIONAL COMPENSATION**

As noted in Item 4 above, Mr. Rogers receives additional compensation for his work as an insurance agent beyond the fee-based compensation he receives providing investment advice through our Firm.

Item 6. **SUPERVISION**

Mr. Rogers is an Investment Adviser Representative of Beacon. He is responsible for providing advice to clients. He is supervised by Dan Benson, Executive Vice President. Mr. Benson can be reached at 615-224-9794. We supervise Mr. Rogers by requiring that he adhere to our processes and procedures as described in our Firm’s Compliance Manual and Code of Ethics and through monitoring his activities accordingly.