

**Item 1.**      **COVER PAGE**

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

**Jonathan Shawn Maxson**  
**Investment Adviser Representative**



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

**Email: [Jon@beaconcm.com](mailto:Jon@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](http://www.adviserinfo.sec.gov). You can search this website by using the IAR’s CRD number referenced above.

July 2025

**Jonathan Shawn Maxson, Co-Owner & Investment Adviser Representative**

- **CRD No.** 5403589
- **Born:** 1971

**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:**

- Bachelor of Science –Psychology, Minor in Business, (1992)  
Tennessee Temple University, Chattanooga, TN

**Business Experience:**

- **Co-Owner and Investment Adviser Representative** (2011 – Present)  
Beacon Capital Management, LLC, Franklin, TN
- **Registered Securities Representative** (2013 – 2017)  
Kalos Capital, Inc., Franklin, GA
- **Registered Securities Representative** (2008 – 2013)  
**Registered Investment Adviser Representative** (2009 – 2013)  
Madison Avenue Securities, Franklin, TN
- **Broker** (2007 – 2008)  
Woodstock Financial Group, Inc., Franklin, TN
- ***Principal Owner and Insurance Agent*** (2001-2011)  
Beacon Financial Group, Franklin, TN

**Licenses/Certifications:**

- **State Securities Exams**  
**Series 66** – Uniform Combined State Law Examination (2007)
- **General Industry/Products Exam**  
**SIE** – Securities Industry Essential Examination (2017)  
**Series 7** – General Securities Representative Examination (2007 - Inactive)
- **Insurance License** (2001)  
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. Mr. Maxson was previously employed as a Registered Representative of a Broker-Dealer. In this capacity, there were two (separate) arbitration claims filed against his former employer, in which Mr. Maxson was not named as a respondent. Both arbitration claims pertained to sales of alternative investment and the firm's supervision practices. Both claims were settled by the prior firm.

#### **Item 4. OTHER BUSINESS ACTIVITIES**

Mr. Maxson has been a licensed insurance agent since 2001. He is licensed to sell life, health, annuities, and long-term care insurance. He approximately spends about 30% of his time on these activities. From time to time, he may offer clients advice or products from those activities and the Firm will earn compensation for him selling such insurance products, including insurance products he sells to you. Compensation earned by the Firm for these products is separate from the advisory fees it receives from you.

These practices may present a conflict of interest because it gives the Firm 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 investment and insurance products through other brokers or agents who are not affiliated with us. You are not required to do business with Mr. Maxson in any of these capacities.

Mr. Maxson also owns commercial real estate that he rents.

#### **Item 5. ADDITIONAL COMPENSATION**

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

#### **Item 6. SUPERVISION**

Mr. Maxson 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. Maxson 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.