

*This brochure supplement provides information about Neel Shah that supplements the Beacon Wealth Solutions LLC brochure. You should have received a copy of that brochure. Please contact Neel Shah if you did not receive Beacon Wealth Solutions LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Neel Shah is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Beacon Wealth Solutions LLC**  
Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Neel Shah**

Personal CRD Number: 6594688  
Investment Adviser Representative

Beacon Wealth Solutions LLC  
241 Forsgate Drive  
Monroe, NJ 08831  
(877) 623-2266  
Neel@beaconwealth.us

UPDATED: 02/20/2019

## Item 2: Educational Background and Business Experience

**Name:** Neel Shah      **Born:** 1975

### Educational Background and Professional Designations:

#### Education:

JD Law, Yeshiva University - 2000

BS Finance, Penn State - 1997

#### Business Background:

10/2015 - Present      President  
Beacon Wealth Solutions LLC

02/2010 - Present      Founder/Partner  
Shah & Associates, PC

09/2002 - 01/2010      Founder/Partner  
Pathak & Shah LLP

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Neel Shah is a lawyer, Founder & Partner of Shah & Associates, PC. From time to time, he will offer clients advice or products from this activity. Beacon Wealth Solutions LLC always acts in the best interest of the client. Clients are in no way required to utilize the services of any representative of Beacon Wealth Solutions LLC in their capacity as a lawyer.

## Item 5: Additional Compensation

Neel Shah does not receive any economic benefit from any person, company, or organization, other than Beacon Wealth Solutions LLC in exchange for providing clients advisory services through Beacon Wealth Solutions LLC.

## Item 6: Supervision

As the Chief Compliance Officer of Beacon Wealth Solutions LLC, Neel Shah supervises all activities of the firm. Neel Shah's contact information is on the cover page of this disclosure document. Neel Shah adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Neel Shah has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Neel Shah has NOT been the subject of a bankruptcy petition in the past ten years.