

CONSULTING BY BEACON STRATEGIES

Helping firms move forward with their vision and execute next-generation strategic initiatives is what Beacon does. We have a team with a record of successes that can help providers better understand their marketplace and collaborate with wealth firms.

- ✓ **Intimate knowledge of the wealth marketplace.**
- ✓ **Deep functional knowledge and extensive industry experience**
- ✓ **Established community of wealth firms through our roundtables.**



A hand is shown moving a black chess piece on a dark board. The board is overlaid with a white and green network diagram consisting of interconnected nodes and lines. The word 'CONSULTING' is written in green capital letters on the left side of the image.

CONSULTING

TAKING A VISION AND TURNING IT INTO REALITY – *We are the bridge between wealth firms and providers.*

Today's wealth marketplace leans into technology. Provider firms are a central foundation that all wealth firms rely on. Much of our work has its foundation on knowing the currents of the wealth management marketplace. As such, we bring a unique perspective to our work with provider firms.

EXPERIENCE AND AN EYE TO THE FUTURE

What we do...listen / hear what the wealth firms want to accomplish

Projects that utilize our unique position in the wealth business for providers:

- Building storylines that resonate
- Provide product assessments
- Conduct competitive analysis

Thought-Leadership that draws on our eco-system of wealth management relationships.

Knowledge that helps firms evolve and scale their businesses through better knowing potential customers;

- Tightening the ideal target market
- Building case studies and pitch decks
- Wealth firm curriculum

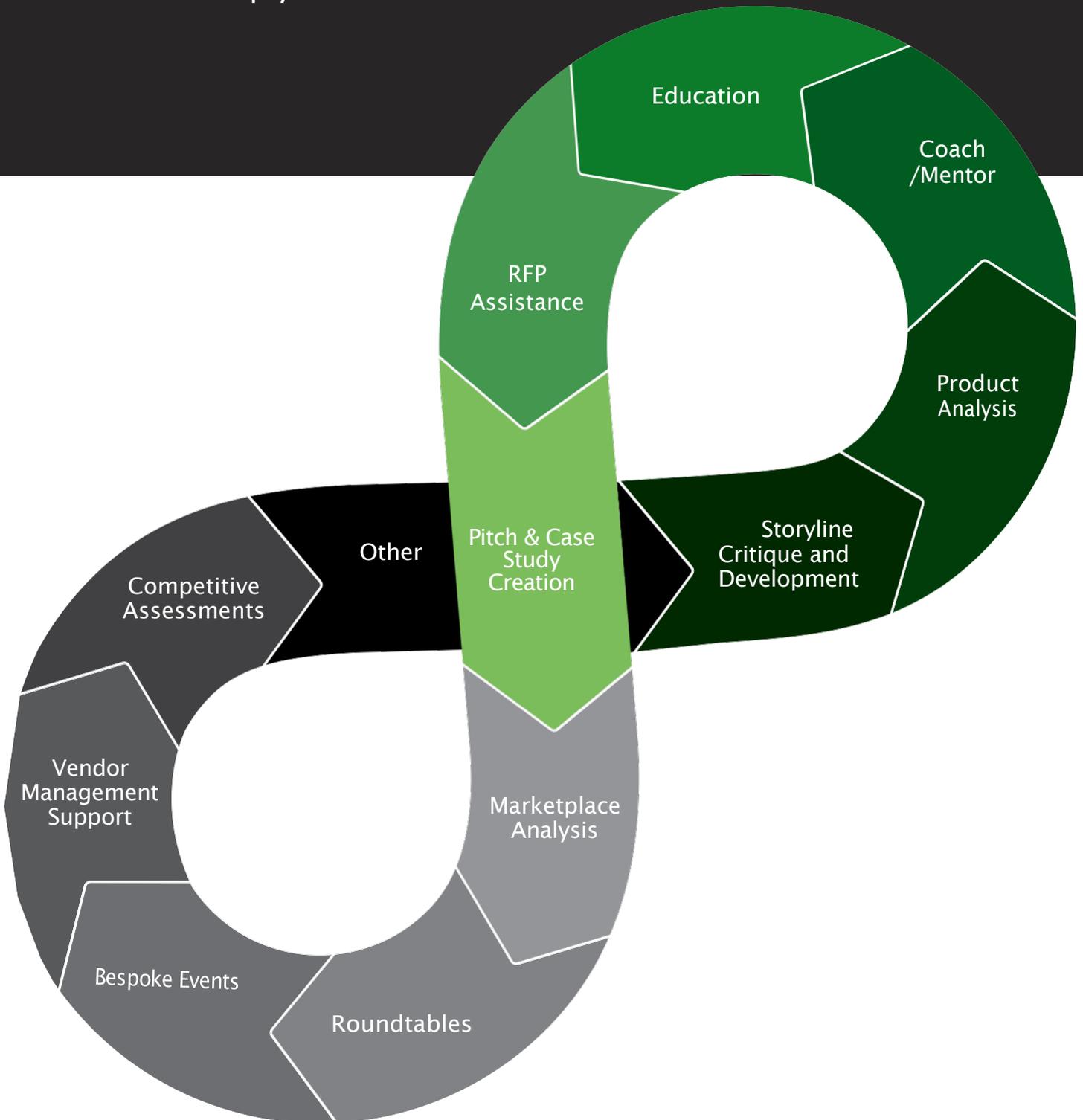
Help firms grow their relationships and revenue.

Our customers leverage us for:

- RFP assistance
- Marketplace knowledge and coaching
- Roundtables

CONSULTING EXPERTISE

Since our company's inception, we have been focused on helping provider firms. The intersection of revenue growth, products that help wealth firms, and relationships is where our expertise lies. Here's how Beacon can help you...



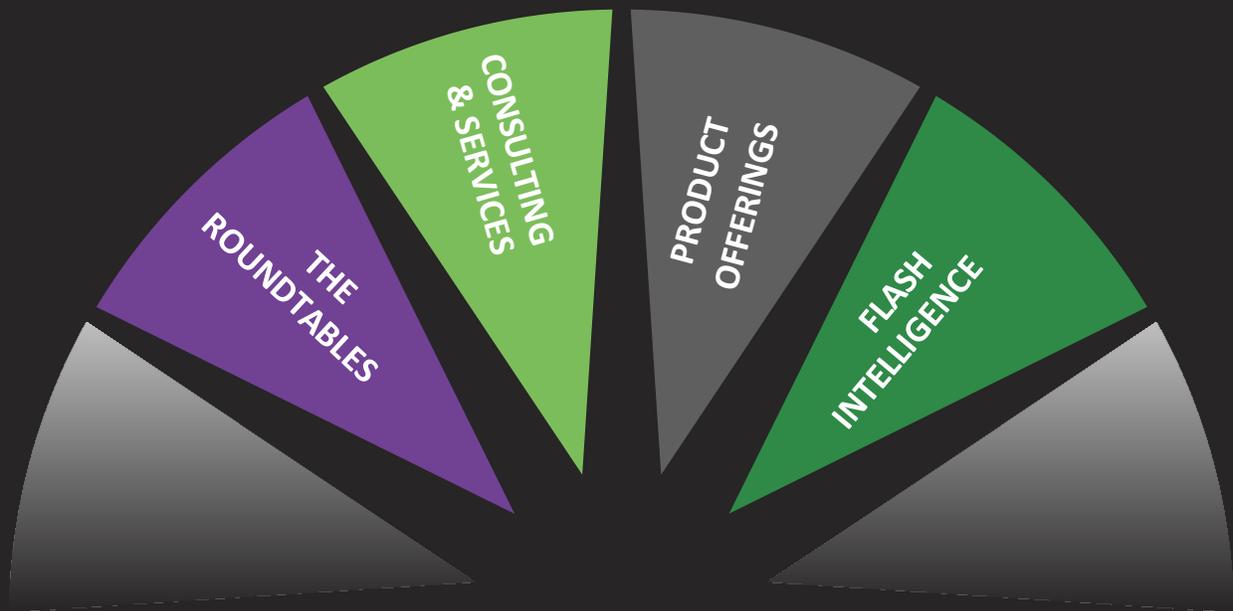


BEACON STRATEGIES, LLC

CONSULTING | ROUNDTABLES | PRODUCTS & SERVICES

AS THE INDUSTRY CONTINUES TO EVOLVE, FIRMS ARE FACING INCREASING HEADWINDS

Chip Kispert founded Beacon Strategies, LLC in 2006 to help wealth management firms and providers meet their challenges with thought provoking roundtables, experienced consulting services, and next-generation products and services. Since opening the Beacon doors, Chip and the Beacon team have become the central repository and bridge to the ever-evolving network of products and services available to wealth firms.



We're excited to share with you our suite of operational, educational, consulting and practice management product offerings designed to support your firm's growth goals and employee development.

To learn more about Consulting and Beacon Strategies:

[Schedule a meeting with Chip](#)

