

# CONSULTING BY BEACON STRATEGIES

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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 network diagram consisting of interconnected nodes and lines. A green line highlights a specific path through the network. The background is dark, and the lighting is focused on the hand and the board.

## 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 client wants 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 idea target market
- Building case studies and pitch decks
- FWealth firm curriculum

**Help firms** grow their relationships and revenue.

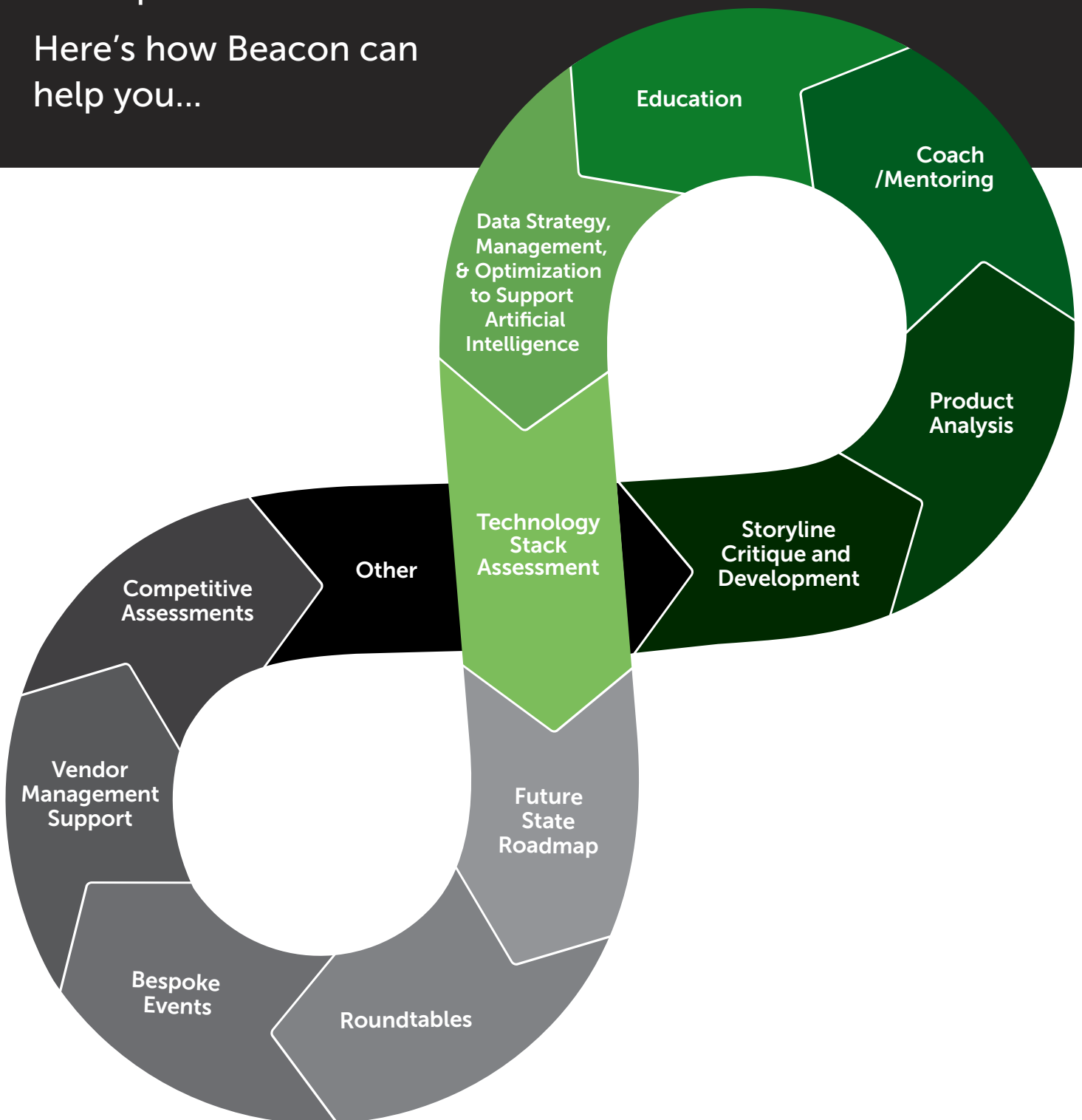
Our customers leverage us for:

- 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...

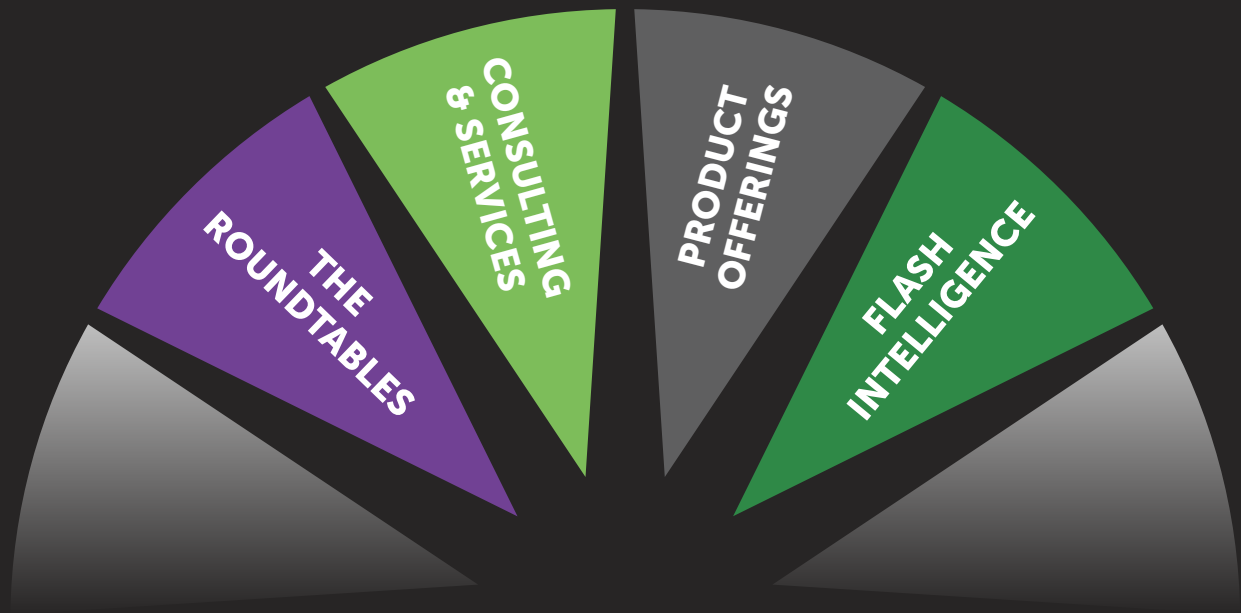




**BEACON STRATEGIES, LLC**  
CONSULTING | ROUNDTABLES | PRODUCTS & SERVICES

## 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 solution providers meet these 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 providers and 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](#)

