

# DATA MANAGEMENT BY BEACON STRATEGIES

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Data drives every aspect of today's wealth companies. The right decisions about data hygiene, security, accessibility, availability, and interoperability can make your data investment pay big dividends as the industry transforms with AI technologies.

- ✓ **Data strategy, governance, and prioritization**
- ✓ **Organizational data management, integration, and hygiene**
- ✓ **Information roadmap, vendor assessment, and vendor management**



## INTRODUCING AI



## ENTERPRISE DATA STRATEGY

AI success hinges on reliable, timely, clean, data sources to be successful. Sourcing, aligning, cleansing, and integrating data from disparate sources and aligning them with data lakes, data warehouses, LLMs, and engines require thoughtful consideration to ensure quality results, required privacy, regulatory compliance, SEC mandated scalability, and auditability. Beacon Strategies extensive knowledge of change management within WealthTech, and regular communication with peer firms and the vendor community enable us to spot trends and opportunities to better align your data and platform architecture for maximum benefit.

Operational efficiency, advisor productivity, marketing effectiveness, competitive position, and firm profitability rely on sound data management. The right decisions about data hygiene, security, accessibility, availability, integration, and interoperability can make your data investment pay big dividends as the industry undergoes an automation transformation.

## ENTERPRISE AI STRATEGY

Emerging technology waters are running fast, wide, and deep. We founded Beacon Strategies to guide firms safely through these kinds of uncharted waters. As our industry embarks on inter-dependent and individual AI and automation journeys, establishing governance, allocating resources for the right projects, and aligning them with solid strategy are critical to produce desired results cost-effectively and compliantly, while reducing risk, and investment.

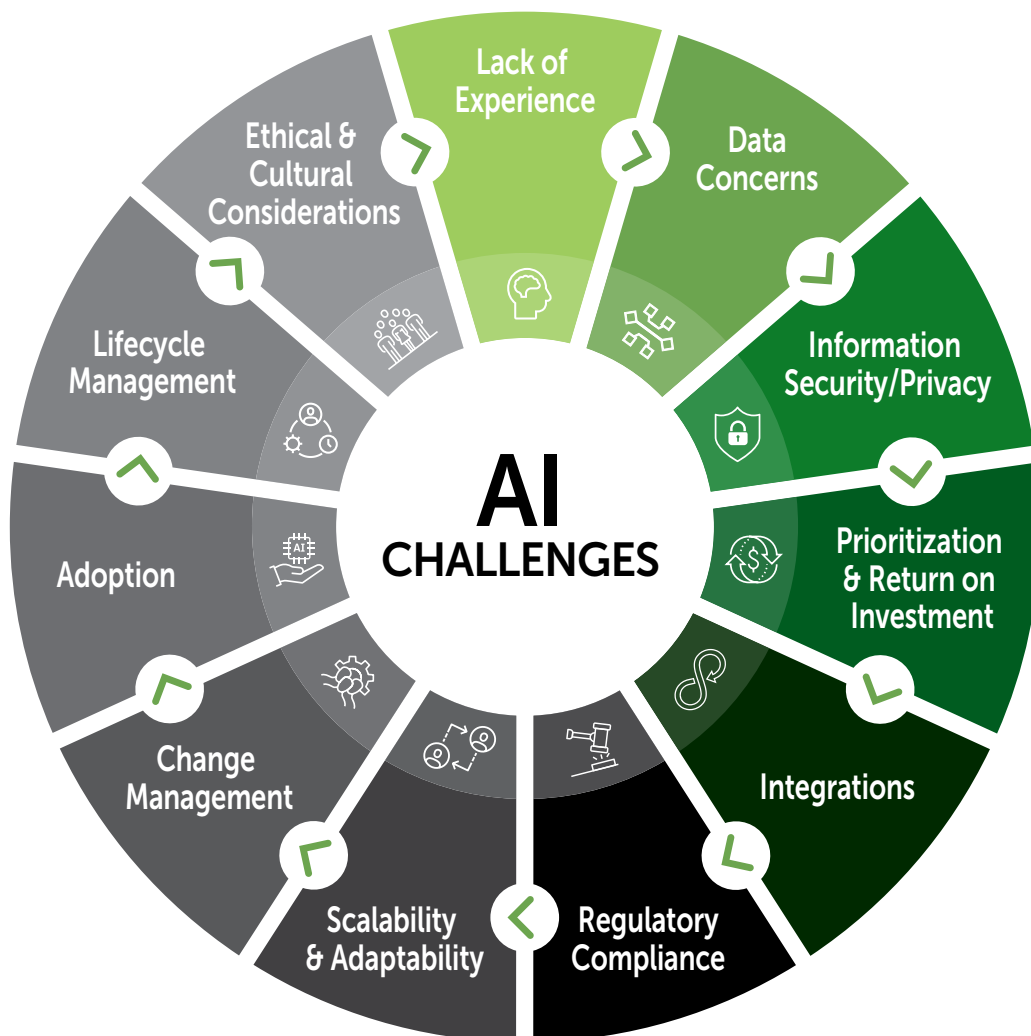
No AI approach is one size fits all. Our process-driven methodology starts with AI governance, goals, practices, and guardrails for your organization to ensure thoughtful evaluation of AI opportunities and effective implementations. Our approach leverages our industry expertise to help you leverage your resources to apply AI and related technologies thoughtfully to align with your resources, readiness, culture and desired results.

## START WITH A PLAN

To realize the full benefits of an AI investment, you need a clear understanding of AI in your context. Thinking about adding chatbots, predictive analytics, machine learning, or automated intelligent actions?.

Our process-driven approach to evaluating and implementing emerging technologies like AI, help you establish goals, practices, guardrails and governance for effective implementations. Our deep and diverse experience helps you plan your resources for maximum impact and minimal disruption.

Thinking about implementing AI? Think about the lifecycle impact of your decision and investment. As a business transformation technology, AI introduces challenges that many firms haven't fully considered, and with every change there is opportunity to improve and grow, while avoiding disruption. We can help you work through those challenges to achieve success.





## WHY BEACON

## OUR APPROACH

By building a reusable framework, we enable firms to adopt AI at a pace they can digest, while providing a reusable approach for new capabilities as they arrive.

- Plan
- Evaluate and Align
- Develop Roadmap
- Policy and Procedure Change Management
- Technology/Partners Evaluation
- Training and Education Implementation Assistance
- Evaluate, Review, and Iterate

## BENEFITS OF WORKING WITH BEACON CONSULTING SERVICES

- Achieve desired ROI and service levels
- Resource implementation and operation
- Align capabilities with evolving regulatory objectives
- Scale flexibly today with iterative, evolutionary processes
- Target Organizational effectiveness not just technological implementation

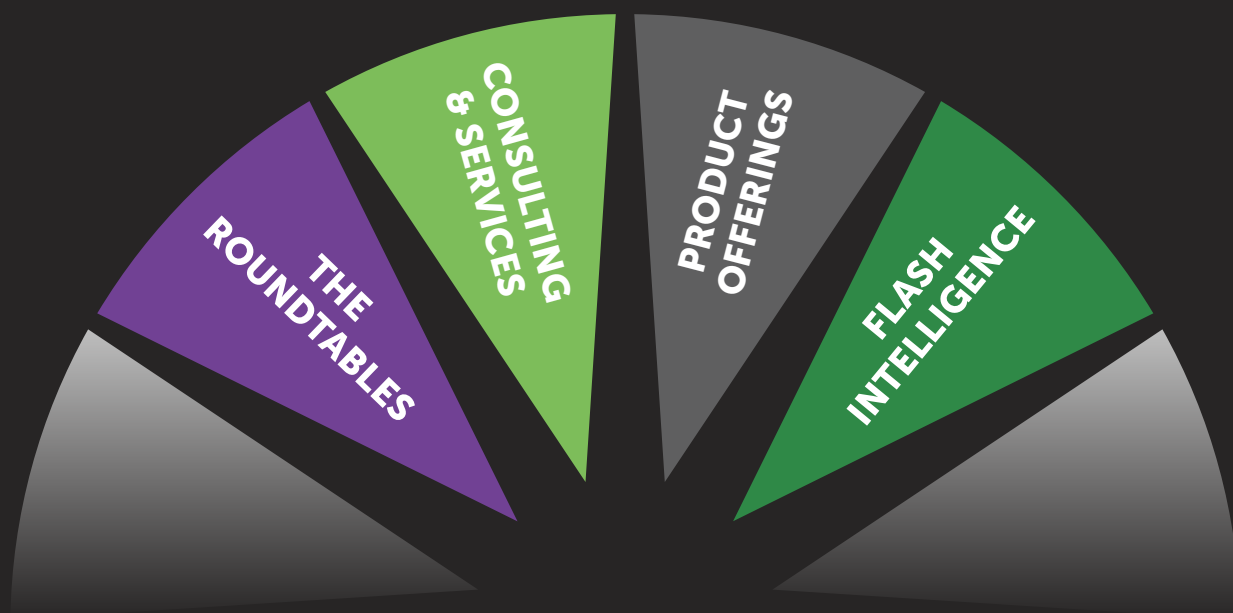
**Please contact us to learn more about our consulting services for AI strategy and how we can help your firm rationally participate in this rapidly changing landscape.**



**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 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 Data Management  
and Beacon Strategies:

[Schedule a meeting with Chip](#)

