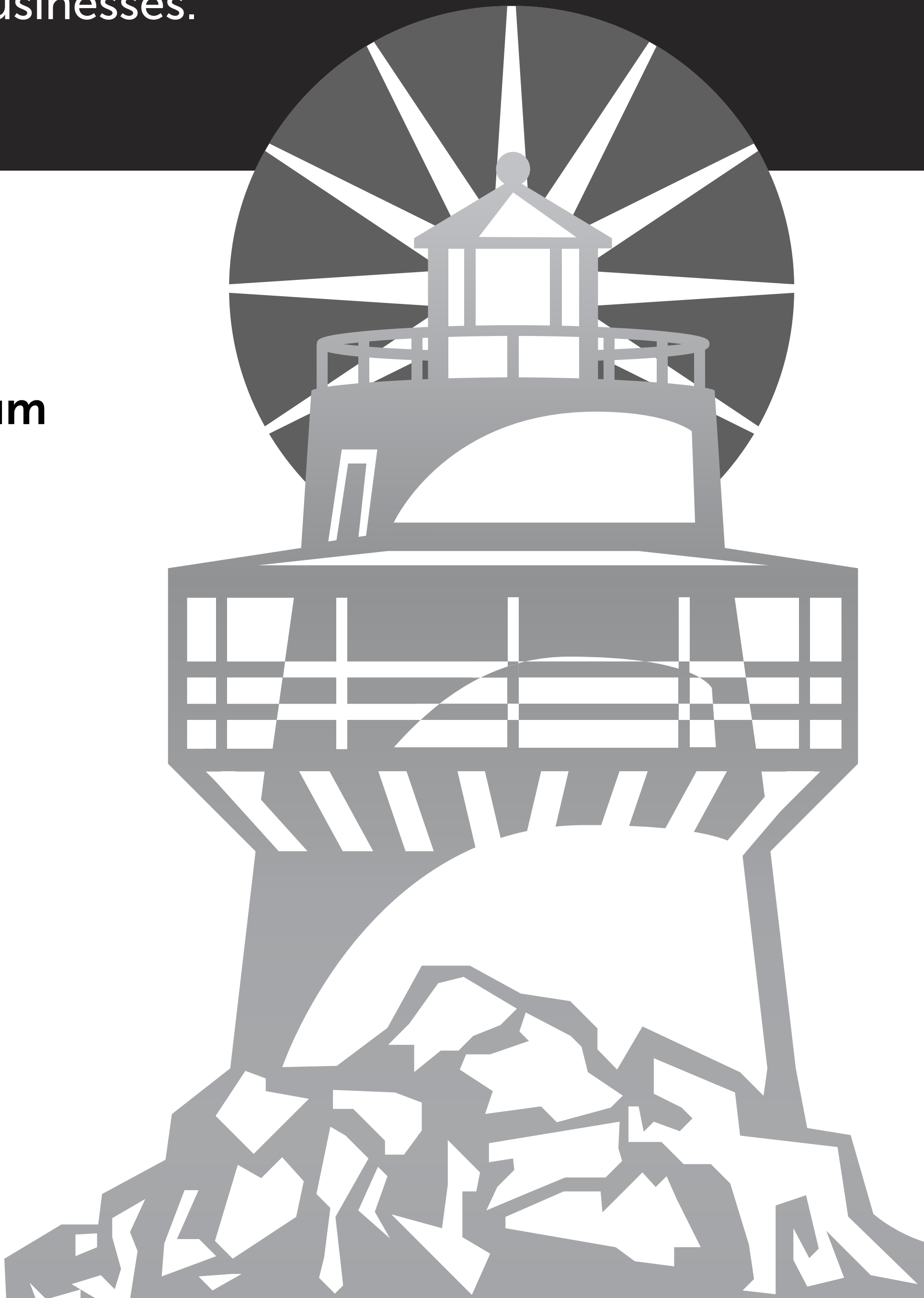
UNIVERSITY BY BEACON STRATEGIES

An interactive online learning platform designed to help educate your employees and keep their foundational knowledge up-to-date on the ever-changing wealth and retirement businesses.



- ✓ **Access up-to-date wealth industry educational curriculum**
- ✓ **Ensure consistent processes boosting client confidence**
- ✓ **Promote a highly trained and engaged workforce**

UNIVERSITY

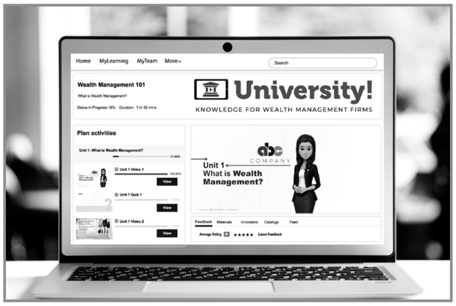
Elevate and nurture your employees' foundational knowledge in key aspects of the wealth and retirement businesses with our interactive online learning management platform.

EMPOWER YOUR EMPLOYEES WITH KNOWLEDGE THEY NEED TO BE SUCCESSFUL

With increasing regulatory requirements, evolving hybrid working models and the rapidly changing wealth management industry, customer-facing employees feel ill-equipped and under prepared to serve clients.

- **Choose** your learning format
- **Elevate** the client experience
- **Empower** employee success and engagement

Our customizable curriculum includes Wealth Management 101, focused on foundational industry elements, continuing education courses, and in-person training options delivered by Beacon Strategies faculty.



ONINE TOOL

Each University student has access to a personal portal to complete their training when they want, monitor their progress, and view additional resources.

OPTIONS TO TAILOR

Firms can tailor course curriculum to include company specific rules and processes for both employee and client satisfaction.

DASHBOARDS TO MANAGE

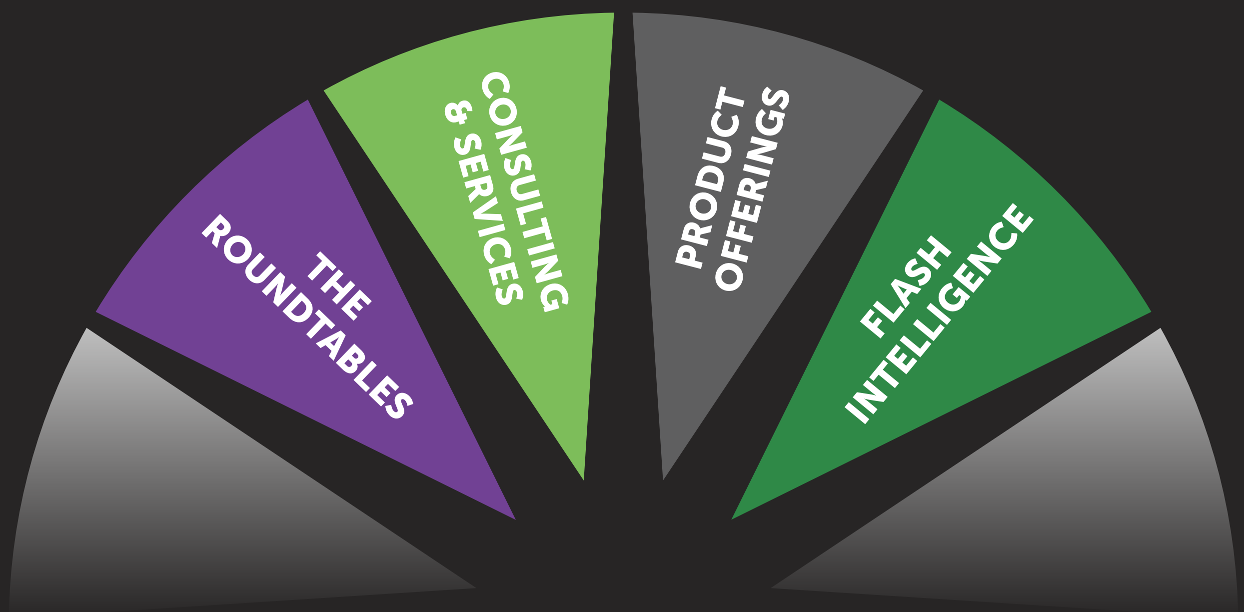
Managers can view employee progress, performance, and opportunities for additional training via a pre-built dashboard.

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 University and Beacon Strategies:

Schedule a meeting with Chip