

# 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 solve the challenges wealth firms are facing.

- ✓ **Process driven approach that aligns strategy and infrastructure**
- ✓ **Deep functional knowledge and extensive industry experience**
- ✓ **Vast provider awareness focusing on those with a SOC2 and successful deployments**





## 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. Yet, technology for technology's sake is unsuccessful. Balancing process, people, and technology, bring together a powerful force multiplier that helps wealth firms scale and serve their investor clients better.

### **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:

- Strategy / Infrastructure GAP Analysis
- Request for Proposals (RFP)
- Schedule A and Cash Management Analysis

**Thought-Leadership** that draws on our eco-system of wealth management relationships. Knowledge that helps firms evolve and scale their businesses through workflow and technology improvements;

- Process and technology roadmaps
- Customer journey mapping
- Functional technology partners suggestions to meet next generation needs

**Help firms** to scale and grow their business.

We are an Outsourced extension of our client's business teams.

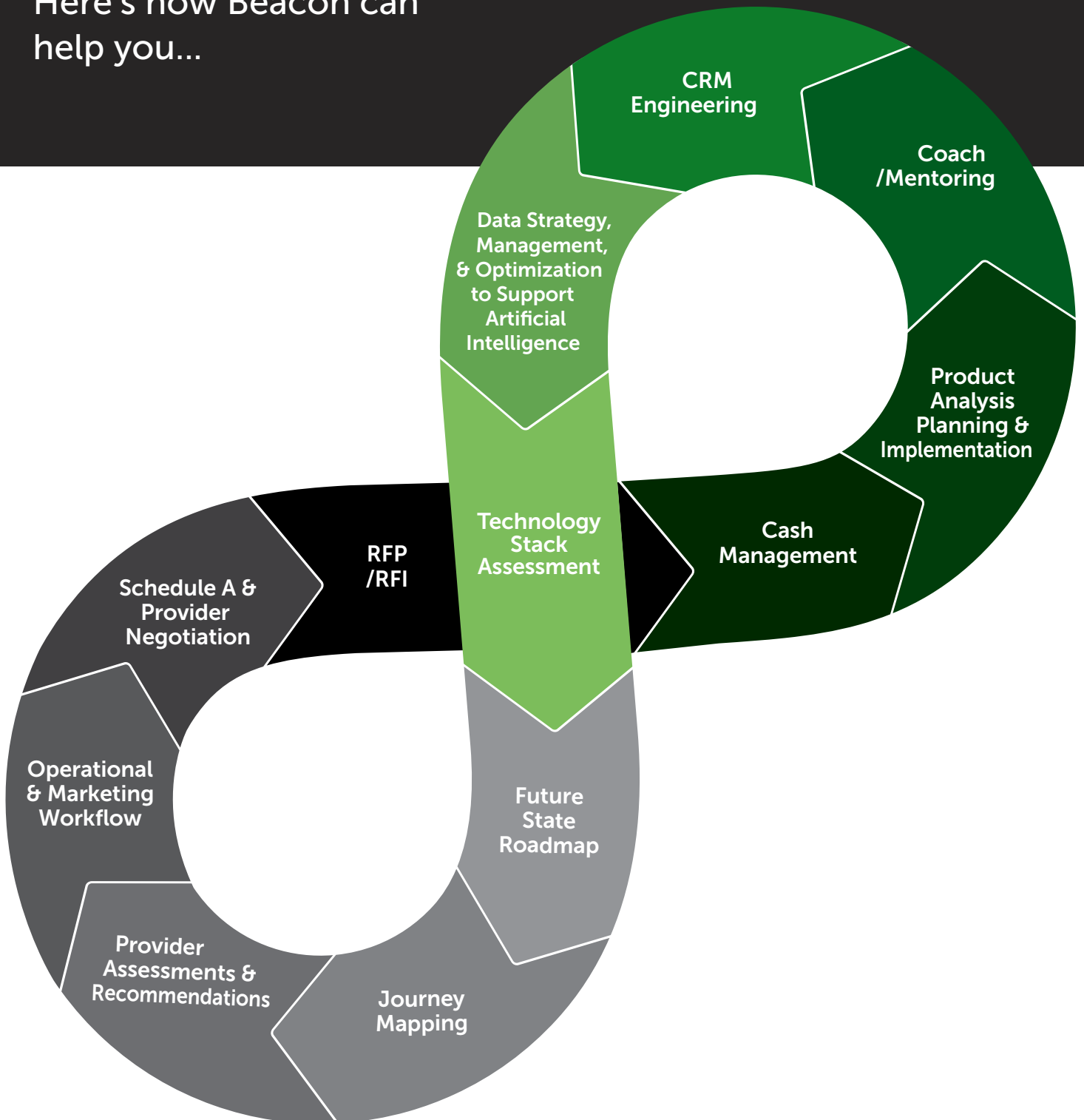
Our customers outsource their next-generation platform and resource needs:

- Agreement negotiation
- Project design
- Implementation assistance – project management and coaching

## CONSULTING EXPERTISE

Since our inception, we have been focused on helping wealth firms. The intersection of functional need, user experience, and technology is where our expertise lies.

Here's how Beacon can help you...



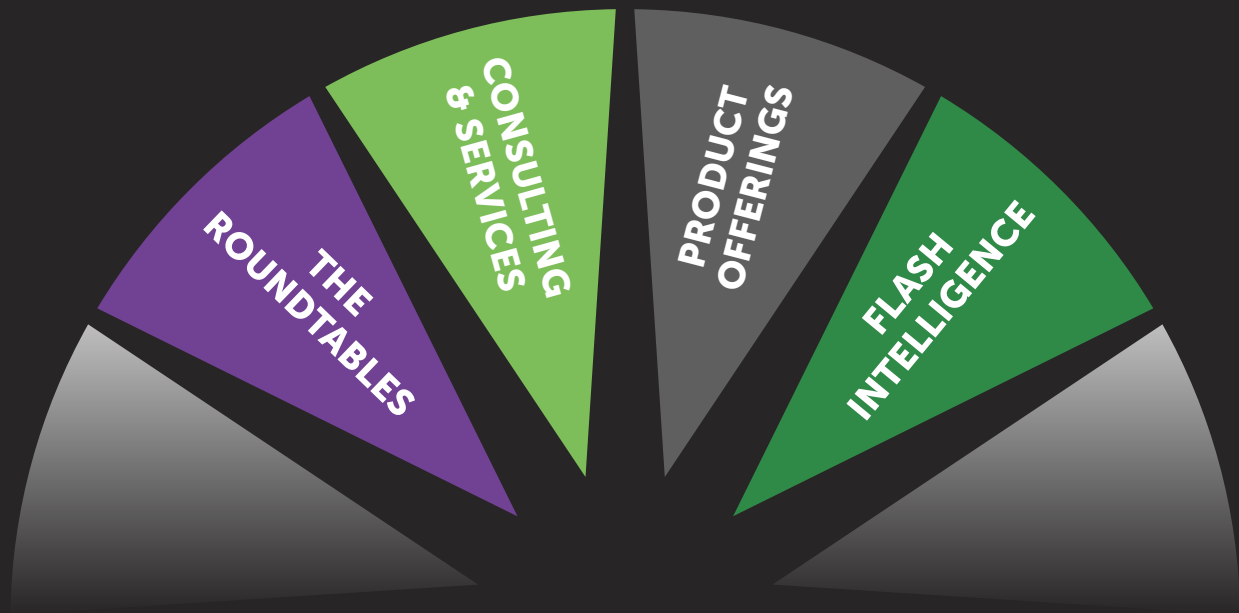


**BEACON STRATEGIES, LLC**

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 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](#)

