Our Clients - Business Owners

Our professionals provide a full complement of financial planning services for successful individuals and their families. We take a comprehensive approach to wealth management that encompasses each individual's financial goals, aspirations and timeframes.

We have designed a process that allows our clients to clarify the risks and opportunities that form the basis of their personal financial plan. Working as partners with our clients, we combine their wishes with our expertise to create a plan to help eliminate risks and capture all potential opportunities.

Because market dynamics and our client's lives can swiftly change, our planning process is on-going to reflect external economic realities and personal choices. Our commitment to this process allows us to quickly make adjustments to take advantage of the best financial decisions based on an individual's unique circumstances.

Most importantly, we listen to which goals are most important to you and which aspects of your existing financial plan may need special attention. This allows us to define the best strategies for preserving and transferring your wealth.

We are always available to review your current plan, any changes you are interested in making and as a resource for any questions on financial planning in general

As the saying goes, time is money and for most business owners their focus is squarely on running the business, with little time left for dealing with personal financial matters.

If you are currently a client of Beacon Financial Partners, you have the opportunity to sign up for out monthly updates on news, information and guidance that is targeted directly at the unique personal financial planning needs of business owners.

Why do Business Owners need our services?

Expertise – You know your business but don't have the knowledge or experience in risk management or retirement planning for example

Time – Your day to day operations take up a majority of your time, relegating dealing with important personal finances to "later"

Life Events – Major life changes such as illness, births or an inheritance make a reassessment of your financial goals an immediate need

Updates – You know you need to refresh your current financial plan but don't know where or how to start

The Unexpected – Business owners in particular need to consider succession planning, sudden death or disability, key person insurance or significant capital gains generated in the sale or transfer of a business

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