Our Clients – Financial Services Professionals

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 a financial service executive you are aware of the importance of effective financial planning, but you likely have not made your own planning a priority. As you know, a down market is the best time to re-evaluate your goals and make any necessary changes.

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 financial service professionals.

As financial professionals, we know your needs.

Time Limitations – Many of our clients travel extensively and work more than the traditional forty-hour work weeks. With little time to focus on their personal goals, they look to us to use a disciplined focus on their personal goals, they look to us to use a disciplined and streamlined approach to handle the financial planning process.

Expertise – Financial services requires many areas of specialization. Our clients understand that while they may have in-depth knowledge of taxes, portfolio management or accounting, they turn to experts for counsel in areas outside of their core competencies. Our experience in personal financial planning, estate planning and insurance is why a significant number of our clients are in the financial services industry.

Pre-Retirement – Most financial services professionals have been planning for retirement from day one. As retirement approaches, we recommend a pre-retirement assessment to make sure your financial resources are aligned with you retirement timing, estate planning and insurance needs.

Independent – Although our clients are part of large financial services firms, we are not affiliate with any particular company or service. This allows us to make the recommendations for products and services that most accurately align with our client's financial goals.

301 Edgewater Place
Suite 100
Wakefield, MA 01880
(617) 217-2166

245 Park Ave., 39th Fl
New York , NY 10022
ph (212) 572-6337