



BEACON
Wealth Advisors

L

Learn

Learning about you is the foundation of our process. We seek to understand what is important to you, your family legacy, your goals, and what shapes your priorities. Our pre-appointment questionnaire guides our initial conversations.

A

Assess

Taking inventory of your assets and debts as well as understanding your risk tolerance and goals is the beginning of evaluating your current financial location on the path to your destination. Our team will evaluate your situation and begin to craft your financial plan.

S

Strategize

We **strategically** plan your steps on the path—from where you are to where you want to be. Our LASER Process balances your goals with your risk tolerance so your path is smooth as you move forward.

E

Execute

Implementing our strategies will help you move toward your goals with a risk adjusted approach.

R

Raise the Bar!

With over 25 years of industry experience, we know that as life unfolds your needs will change. We continually use new solutions, services, and technologies, as well as addressing estate, end of life, insurance, long-term care, and tax and legacy planning. The LASER Process ensures that your comprehensive plan adjusts as your needs change to continuously **Raise the Bar!**

Putting you and your interests first every step of the way.