

# CURATED FIRM SPECIFIC ROUNDTABLES BY BEACON STRATEGIES

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We are excited to create and curate a customized roundtable for enterprise wealth firm and solution provider professionals including case-study discussions, breakout sessions, and community questions.

- ✓ Focus on Firm Specific Topics / Categories
- ✓ Wealth Firm Leader and Solution Providers Engagement
- ✓ Successful Model for Open and Honest Dialogs



## CURATED FIRM SPECIFIC ROUNDTABLES



## LET US PLAN A “CUSTOMIZED” ROUNDTABLE FOR YOU

Firm Specific Roundtables can focus on specific categories or overall firm business needs. Roundtables encourage thinking out the box with wealth firm leaders and solutions providers at the table together in a safe space for open and honest discussions. Utilizing case studies, breakout sessions and community questions.



“Solutioning” / ideas on current / specific ideas and challenges



Employee engagement

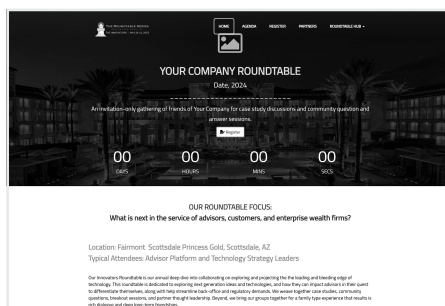


Provider partnership and awareness



### CUSTOMIZED ROUNDTABLE

Customize roundtable categories and topics. Successful model to deliver a quality, learning and fun experience to your attendees, employees and partners.



### ONLINE TOOLS

Registration, booking travel and management tool. Each attendee will have access to register online providing personal details.



### WHITE GLOVE EXPERIENCE

Utilizing Beacon’s knowledge of the industry, experience and relationships, planning of the roundtable is done for you, and you and your attendees just need to show up.



**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 Curated Firm Specific Roundtables and Beacon Strategies:

[Schedule a meeting with Chip](#)

