Experience is everything.

BEACON HILL
PRIVATE WEALTH

Picture it: peace of mind.

Imagine having the freedom to focus on the things that give you energy.

Live life boldly and leave markets, planning approaches and tax strategies to us.

When you work with Beacon Hill Private Wealth:

You achieve **clarity**.

Live your life now, and when you think about the future, be confident you'll end up exactly where you want to be.

You feel **empowered**.

Know your financial strategy incorporates layers of hard evidence and is designed around your true needs and wants.

You gain a **partner**.

Get comfortable sharing your values and goals with a fiduciary advisor who puts you at the center of your strategy.

We believe that when our lives are guided by a sound plan, we can achieve great things.

The essence of our approach to serving you is to always act in your best interests.

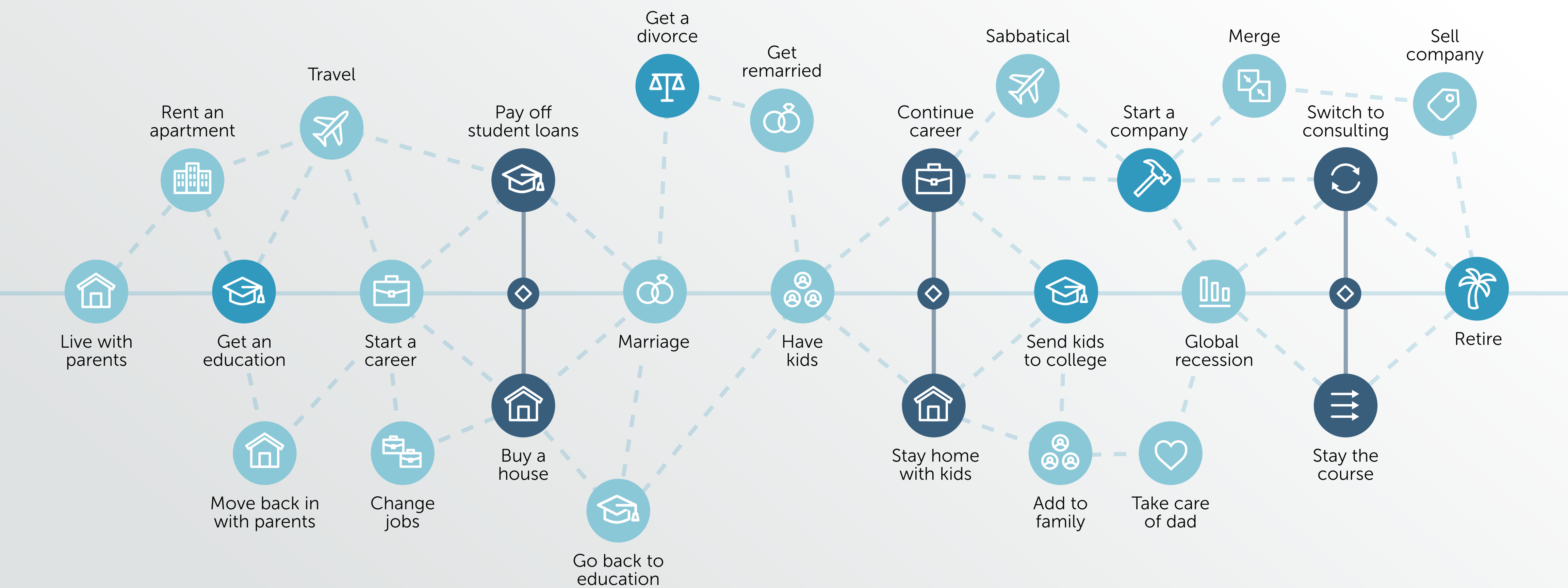
This means making recommendations based on what decades of peer-reviewed financial research has shown to be the right way to invest. It means relying on proven financial planning strategies. It means getting to know you, your family, your goals and your most important dreams. All to craft a plan that embraces – and improves – the most important aspects of your life.

A clear path on life's winding road.

Life isn't linear:

Your plan shouldn't be either.

Navigating your finances through each phase of life requires more than just a plan. **It requires a partner.** Through life's ups and downs, we will be there with you through every step acting as a trusted confidant and fearless guide—your first phone call when something happens.



We're different, and so are you.

Life changes, we evolve.

Your life is layered with significant events and nuanced circumstances that can influence your future. You can rely on us to keep your plan on track, anticipate your future needs and help you navigate life's complexities with ease.

design | build | protect

First, we embark on a personal discovery process to uncover what's important so we can **design** a plan customized to address your deepest wants and needs.

With academic research and financial science as the foundation, we **build** a plan that's the perfect fit, with distinct objectives and attainable action items.

Then, we **protect** your plan by checking in to measure progress toward your goals and adjust as needed.

Your experience is everything to us.

Your strategy begins with you.

What do you really want? To support your favorite causes? To send your children or grandchildren to college? To feel confident you have enough?

Our unique evidence-based planning approach is centered around your life: your goals, your dreams and the impact you want to make on this world.

The Elements of a Financial Strategy

We plan from the bottom up. Your dreams and passions are too important to leave up to chance. We serve as think tanks, with a kinetic mix of passion, drive and diverse professional experience come together to benefit our clients.

Money, goals, life and impact — your financial strategy is more than just investment decisions. Your dreams and passions are too important to leave up to chance. A sound financial plan encompasses every aspect of your life and is built to last.

Envision a financial future filled with less guesswork and more science.

Your portfolio is no doubt an important driver of your overall financial plan. In response, we start and end with evidence. Our approach is guided by decades of objective, peer-reviewed research on how markets work.

The strategies in your investment plan are risk-optimized, cost-effective and tax-efficient to enhance your odds of living the life you've imagined.

We are enthusiastic, unapologetic advocates of evidence.

Let data bring you peace of mind. Work with your advisor to control what you can: taxes, fees and risk. Your portfolio will contain diversified stock funds; high-quality bonds; and, in some cases, alternative investment strategies.

You deserve the brightest minds on your side. An investment strategy driven by rigorous, peer-reviewed research gives you the best chance at reaching your goals. The strength of your plan comes from advanced strategies rooted in academia plus a committee-based approach to investment policy.

The support team behind the scenes.

The power of partnership

When you work with us, you're supported by a diverse team of resources and specialists. As we sit with you to develop your personal financial strategy, our strategic partnerships help assure you get a well conceived plan designed to meet your long-term goals.

Investment Strategy and Analysis. We aim to capture the returns of global stock and bond markets to help our clients reach their long-term goals while controlling risks, costs and minimizing taxes.

Trading and Operational Support. We spend more time with our clients and deliver more timely and accurate investment management because of our back-office support partnership.

Advanced Financial Planning. Our clients benefits from the perspectives and guidance of industry leading financial planning minds.

Who's on your team?

Beacon Hill Private Wealth
Whenever you need advice or insight, we will be there. No question or concern is too small.

National Custodians and Thought Leaders
A deep bench of specialists support us with the latest investment and planning insights.

Other Professionals
A truly holistic approach to your financial future may involve close collaboration between your advisor and attorneys, CPAs and other service providers.

Ready to Start Your Holistic Wealth

Experience?

Experience a sense of calm

and confidence when you collaborate with your advisor to create a plan that's right for you.

Experience a smarter way to invest and plan

with a financial strategy infused with decades of evidence-based research.

Experience the best of both worlds

through a personal relationship with an advisor backed by national thought leadership resources and intellectual insight.

What You Pay

In addition to being fiduciaries who always work in your best interest, we are proudly fee-only. We do not receive compensation or commission for selling products. This model ensures we are always on the same side as our clients.

From the start, you will receive clear and transparent pricing information aligned with your unique scenario. We price our services on various factors, including your personal financial situation and assets managed; at each incremental breakpoint, you pay less on the dollar.

For an exploratory consultation, please contact
Tom Geoghegan, CFP®, CIMA®, CPWA®, RWA®, MBA

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