



BEACON GAINER

ORGANISED WEALTH FOR YOUR WELLBEING

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## WHY BEACON GAINER?

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### PEACE OF MIND THROUGH FINANCIAL WELLBEING

Our purpose is to take the weight off people's shoulders, which tend to be quite the broadest in those who create and curate private wealth.

Our method is to organise, manage and achieve all those goals in life that private wealth may touch. We bring the right people together, to achieve particular aims, positive social and/or environmental impact and comprehensive financial wellbeing.

### WELCOMING YOU INTO A CIRCLE OF TRUST

We only work with advisors we know professionally and trust personally. We would not expect our clients to trust our recommendations on any other basis.

Our carefully-selected, personally-known and proven experts, across the diversity of sectors, are there at your fingertips, for collaborative expedience. Multiple streams of communication and live projects are channeled through a single point of contact at Beacon Gainer, to give you back your time.

For, as you know, having time to spend on what you do best is wealth indeed, accelerated as we help reduce your costs to market entry or new client development.

## GOALS

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### PEACE OF MIND IS OUR ULTIMATE GOAL

How do we simplify the complexities of organising private wealth?

By focussing in on customising the advisory service to fit personal requirements, quickly connecting clients to a collection of independent advisors and firms across business sectors and by expertly managing your objectives.

Many types of challenges are brought to Beacon Gainer specialists to tackle, with and on behalf of clients, for example:

- ENTREPRENEURSHIP & NEW WEALTH
- RETIREMENT
- DOMESTIC & CROSS BORDER FINANCIAL PLANNING
- MEDICAL MANAGEMENT
- FAMILY WELLBEING
- WEALTH CREATION & PRESERVATION
- PRIVATE OFFICE & BUSINESS SUPPORT
- NEXT GENERATION INVESTORS
- REAL ESTATE PLANNING & INVESTMENT
- ETHICAL & SOCIAL IMPACT, & PHILANTHROPIC ACTIVITY
- GLOBALISTS - EXECUTIVES & FAMILIES
- FINANCING
- SUCCESSION PLANNING & INHERITORS
- DIVORCE & FAMILY PROTECTION

Beacon Gainer helps clients achieve single or multiple life goals, in the short and long-term, connecting the dots between objectives, experts and firms.

Streamlined through a single point of contact, you keep sight of the complexity, without getting bogged down in the managerial nitty-gritty of it all. Which frees you up, in every possible sense.

## ETHICAL AND SOCIAL IMPACT AT BEACON GAINER

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### THOUGHTFULLY SOURCED ADVISORY SERVICES

The independent advisors who comprise Beacon Gainer are thoughtfully sourced, driven by integrity, fairness and continuous improvement. These specialists represent companies that not only have a history and record of excellent care of their clients, but also notable corporate social responsibility principles and purpose.

Our purpose is to smooth the way to achieving life goals via a trusted portal of advisors which includes meeting requirements for ethical and social impact.

### HOW DO I PRIORITISE ETHICAL AND SOCIAL IMPACT?

We simplify the processes of selecting advisors who meet environmental, social and governance principles. These may be providers, for example, with clear commitments to climate goals, or who demonstrate a strong intention to improving their impact in a community. We are offering the industry a tech solution that drives investors with a social- and climate-impact purpose.

We offer an in-house advisory service specialising in ethical and social impact, for business, individuals or families. Our dedicated Ethical and Social Impact Business Manager strives to ensure that ethics are never a footnote, afterthought or tick-box initiative for us. This complements our Founder's experience in social investment and recognition as an award winning social impact entrepreneur.

## BEACON GAINER PORTAL

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The Beacon Gainer portal not only acts as a bridge to our collection of handpicked experts but is a hand for the taking to achieve professional life goals.

Why are we so sure? Because we have worked hand-in-hand with our clients and advisors for the last five years, to inform its design and development, innovating to ensure it raises the industry bar with its features and functionality.

The portal complements existing ways of working across sectors, firms and with professional advisors. All the while customising the selection of advisors to fit with users' life goals and financial wellbeing. It also provides functionality to help manage your more complex projects that may involve multiple people.

Using the portal gives private clients an efficient way to reach a high-quality stream of cross-sector professionals while simplifying the way to identifying and articulating their goals. The portal then acts as a central hub, to be used while working on achieving those goals with our professionals.

In addition to organising advisory, this level of service can be easily extended to a hand with project management, or longer-term private office support from the Beacon Gainer team.

From its inception, the purpose of the Beacon Gainer portal was to smooth the way to wealth-driven goals, organising financial well-being on one secure platform. Armed with grit, determination and clients who know what they want, we have been able to deliver this with gusto.

## GAME-CHANGING APPEAL

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### WHY CLIENTS CHOOSE BEACON GAINER

Until now, today's tech-savvy, highly-mobile consumer was underserved by the private wealth advisory sector. Beacon Gainer's fresh approach meets those needs and expectations like no other independent or in-house-corporate service.

### CUSTOM FIT

Anything other than personalised service is now outdated. We ease the way to achieving a client's aims, in the right way for them, through truly tailored advice. We are approached with many different types of challenges and life goals. As varied, in fact, as the profiles of our advisors and project managers, all of whose diverse companies are unified by their records and history of socially responsible principles.

The Beacon Gainer Digital Portal provides convenience and efficiency to this wide span of clients and professionals, giving instant access to all the cross-sector services necessary for achieving personalised, financial wellbeing goals.

Clients use us to find the right professionals, for the right advice, at the time that's right for them.

### FLEXIBLE ACCESS

If checking your banking app on the go, or operating across multiple time zones, is an everyday norm, why not so for the rest of your financial affairs? Beacon Gainer meets the needs of today's ever-mobile, 'always on' consumer. Regardless of a client's or an advisory firm's location, our service provides uninterrupted and collaborative focus on achieving life goals.

## GAME-CHANGING APPEAL

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### CONSCIOUS SOURCING

Whether they are part of Generation Z, or lie awake at night worrying about the next generation, clients' decisions are increasingly driven by altruistic concerns. Hearing this call, we take it seriously, as it drives us also. Mindful of individual requirements and ethics, we enable clients to link to pre-qualified firms with social purpose principles and good impact, to ensure their choices effect positive change, as well as their own peace of mind.

### UNIQUE VALUE

Only at Beacon Gainer can our low-cost entry point deliver:

- A high quality network of cross-sector professionals who have common and strong social and ethical values.
- An online experience that helps a client easily and quickly articulate their goals, so a network of the right professionals can be recommended and selected, on demand.
- An additional online portal, that acts as a central hub, used as needed while working with professionals. With only the client's aims at heart.
- This level of service can be easily extended, if Project Management or longer term Project Office support is needed from the Beacon Gainer team.



## WHY A DIGITAL PORTAL?

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### THE JOURNEY TO TECH-ENABLED ADVISORY SERVICES

From the start, innovation has impelled our entire business model. The 2021 launch of our tech-enabled platform is built on five years of working closely with private client advisors and professional service firms - specifically, grouping advisory services to better achieve the aims of today's client.

Our platform conveniently matches multiple areas of advisory, matching client to advisors and enabling collaboration in one, user-friendly place.

### PIONEERING

Responding to client needs, we offer a new services and way to acquire the right advice.

Offering a shop window onto a breadth of experts, there at their fingertips to consult across every corner of private wealth, to achieve their aims, all from the convenience of home. It's a way for now.

The entire initiative is based on market analysis of advisors' pain points, gleaned from interviews in each sector of private wealth. Themes based on insights about what makes a platform emerged, and so Beacon Gainer got to work to pioneer a link between advisors and clients, centred around their aims.

## WHY A DIGITAL PORTAL?

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### What advisors told us they want:

1. Convenience - functionality to organise client work across multiple areas of advisory services.
  2. Opportunity to be consulted by a qualified prospect - matching appropriate client to advisor.
  3. Building relationships.
  4. Organisation to suit their working ways.
  5. Opportunity to show value.
  6. Centralised briefing on clients and onboarding made easier.
  7. Privacy and discretion is key.
  8. Security is vital.
  9. The ability to draw targeted users's attention to strengths and differentiators.
- The Digital Portal we built provides a strong foundation for it to scale and adapt as needed.
  - It offers a simple but clever set of features and functionality.
  - Simple, as it needs to complement existing ways of working and behaviours across established sectors, firms and professionals.
  - Clever, because it needs to offer something more than what an individual person can support. We do this using AI algorithms and data to instantly match clients to advisors, while providing central functionality to help manage a project involving multiple people.

## A PORTAL FOR PROFESSIONALS

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It's easy to understand how Beacon Gainer offers private clients a new way to acquire advisory services, to work on aims and life goals, across a tiered choice of service levels...

But how is it expedient for advisors?

### MATCHING (LEAD GENERATION)

Qualified leads save everyone time and money. The Beacon Gainer Digital Portal is designed to deliver these much-desired qualified leads, using artificial intelligence to match you to clients that have met certain criteria and match yours. You will receive a qualified lead in your inbox, with a rich profile, giving you a head start for the all-important first conversation. So you have the best opportunity to establish trust and build a strong relationship early on. You will sit on a shortlist of three, providing the client with enough choice, but not too much. Once they have selected you, both parties will know it is the right fit. After a client has used your services, you will be attached to their profiles they can easily invite you to other challenges.

### ONBOARDING YOUR CLIENT

Your current onboarding process and checks (which need to happen outside the portal following your usual approaches) will be supported by the portal as it houses key data and documents as part of a client's profile. This removes the hassle of sourcing, from a busy client, what has already provided in detail to so many others.

### ONBOARDING WITH BEACON GAINER

Initially, Beacon Gainer will bring you into their network and set you up on the portal. In the longer term, this can be managed on the portal.

## A PORTAL FOR PROFESSIONALS

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### MARKETING

The portal reduces the resources you need to invest into client development and places you amongst the experts with whom clients can consult about their challenges.

You will have the opportunity to showcase your firm and yourself on your own profile, visible to all Beacon Gainer clients, and the professionals you are working alongside on the network.

Into the future, the portal has the potential to support your marketing activities, broadening your ongoing client engagement by showcasing thought leadership. Whether to all your clients – past and present or to specific clients, you can target accurately the content you know would be of interest.

### COLLABORATION AND COMMUNICATION

To support collaboration, and visibility, you will have a dashboard for each challenge you are part of. This is where key documents can be stored and messages with attachments can be sent, to-do lists can be created and updated, and other users on the challenge are listed.

Discretion is achieved by users being asked to confirm sharing to a challenge (and connected profiles) when uploading documents. By using the portal with your client, it is an easy way to provide ongoing visibility centrally, providing the reassurance that things are moving forward.

On an ongoing basis, the portal can be used as a central place for communication on a specific challenge through simple messaging - either one to one with clients or advisors, or to all involved. This will be integrated with your existing ways of working by delivering email alerts to your usual inbox, with an easy route to reply via the portal.

The portal has been designed to complement, and not duplicate, your existing digital systems and ways of working. All messages will be saved securely and remain accessible if they are needed for future reference.

### REASSURANCE

Collaborating professionals operate, secure in the knowledge they are working with other firms and individuals like-minded in their approach and priorities, having also met Beacon Gainer's qualification criteria across fairness, integrity, social and ethical responsibilities.

## WHAT TO EXPECT FROM BEACON GAINER

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### PUTTING PEOPLE FIRST

Being a pleasure to talk to, and building relationships based on respect, discretion and gracious good-humour, are the foundations of our business. From that first conversation, we are here to understand and support your work-style, team dynamics and those all-important client goals.

### A SERVICE THAT INNOVATES TO SUIT YOU

For every goal, there is an expert - and an appropriate level of service.

In 2020, we innovated our services and acquisition of advice, adding a digital option to our face to face business. We continue to mould ourselves for the best customer fit. Clients now have the choice now of a scaleable and comprehensive three-tier service.

1. **Plug and Play Advisory** - Organised and tailored for clients to plug into the right advisors, to ease the way for their objectives and management of financial affairs.
2. **Project Office** - As it says on the box, a client's own project management team can be organised to join up the thinking and keep the upper hand.
3. **Your Private Office** - This combines the Plug and Play Advisory and the Project Office with an infrastructure to separate private and business affairs.

Whichever works for the client, for whatever stage in life they're at, our flexible, integrated, modernised approach gives you peace of mind.

**Financial peace of mind is not only preserving private wealth, as we tell our private clients.**

- It is having the right advice and a service to suit you.
- It is the speed at which your needs are met.
- It is having your grit and optimism matched with an advisory service which feels like extended family.
- It is the discretion and kindness of the people you deal with to achieve your life goals.
- It is a hand for the taking with devotion to your objectives.

## HOW IT ALL WORKS

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### SAVING YOU TIME AND MONEY

It takes time, expertise and understanding to organise and preserve a client's private or shared family wealth, let alone to find the right people in the first place. Time that is best spent on your specialism, not the administrative nuts and bolts of project management, client development and chasing down those all-important introductions.

Beacon Gainer was founded on the idea of saving everyone time and money by quickly linking clients to a circle of independent professional advisors, selected for their outstanding expertise and ethics.

#### 5-step journey to join Beacon Gainer

1. We meet - in person, or remotely as you prefer - with Lara, our founder to discuss what expertise you have to offer, and who might be your ideal clients, to understand your requirements and objectives, your firm's dynamics and values, and remain on-hand, throughout.
2. We liaise with the private client, working together as necessary, to achieve their specific goals, with total transparency about what is realistic within your timeframes. Contact will be made within 24 hours to arrange a discussion between you and the client.
3. We endeavour to answer phones and get back to you promptly - within a day - and will advise of any delays and offer suitable alternatives. You can reach us by phone between 8.30 am - 6 pm Monday to Friday. All emails will be responded to within 24 hours and letters will be responded to within 48 hours, or 3 days if a more in-depth piece of research is required.
4. You have direct access to your own clients, and wider expertise within our network of firms.
5. We keep following up for you, and keep you informed of progress across projects up to the completion of a goal. All communications can be channeled through Beacon Gainer and our digital portal for an easy, single point of contact.

Overall, our economic value is that we are aggregating. Whether for advisers or clients, we make massive efficiencies, especially in speeding up the entire process from start to finish. Join us, as we become the fastest at linking consumers to professional wealth advisors.

## LARA LEIGH-WOOD

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### OWNER, FOUNDER AND MANAGING DIRECTOR AT BEACON GAINER

Lara founded Beacon Gainer in 2015, out of a sense that life could be made easier for private clients and professional advisers. Her simple yet novel idea was to work towards specific goals associated with wealth management, rather than a traditional, more generalised approach.



Entrepreneurs and wealthy families - who work so hard to build and protect their wealth, often through great personal sacrifice - were at the mercy of services that were not adequately agile to work with them on a personal level. Commonly, these services were not designed around the needs of today's retiring or inheriting generations. Nor did they engage with new wealth creators, but had become an unacceptable norm.

With over a decade's experience in private client advisory, and a background in wealth management, financial services, social investment and non-profit fundraising, Lara spotted the opportunity and knuckled down to transform private finance for today. Beacon Gainer was created to stay ahead of the curve, digitally and logistically.

Her role as Managing Director includes being the first point of contact for clients, which she adores, as a skilful, long-term relationship-builder. With personal experience of the delicacies involved in managing wealth and expectations across diverse family members, Lara's choice of advisors reflects her natural discretion: she makes her introductions based on personal trust and professional respect. Attention to detail is vital, and is driven by her understanding that wealth creators have the broadest of shoulders.

Raised in London, Lara's career has spanned London, Paris and Montreal where she attended McGill University and became a member of the prestigious Scarlet Key Society. She is a passionate bibliophile, French speaker, cook, tennis player and skier, forever longing for the slopes of the Swiss and Italian Alps.

## HEATHER DARNELL

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### FINANCE DIRECTOR AT BEACON GAINER

Heather is responsible for rigorous financial control at Beacon Gainer. She also works closely with Lara planning the commercial future of the firm.

Heather's career has taken her to Canada, the US and the UK in both Finance and IT for the world's largest affinity marketing company. From Financial Analyst to IT Director to Chief Information Officer to Operations Director – her career has spanned all areas of the back office of an organisation.



After moving between Washington DC, Connecticut and Boston, Heather attended university in Montreal where she graduated with a BA in Philosophy and became a member of the prestigious Scarlet Key Society. She moved to London in 1998 when she met her future husband on her first day of work.

Heather volunteers with the Octavia Foundation and she is a trustee of the Dalgarno Trust. She is an obsessive football supporter. She keeps as fit as her heroes by running around London with her laptop. Or with her Hungarian Vizsla. Or both.



## ALLY GOLDBERG

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### MEET BEACON GAINER'S ETHICAL AND SOCIAL IMPACT BUSINESS MANAGER

Ally Goldberg specialises in social purpose principles in private wealth. Working closely with our team of advisors and clients, Ally simplifies the process of embedding ethical and sustainable impact into our clients' wealth-driven goals.

Ally discovered a passion for ESG and CSR while studying for a Business Management degree at the University of Sussex, where she won multiple awards for her work in social responsibility, including a national award in Diversity and Inclusivity Management from Bloomberg.

Recognition in this area, coupled with a first class honours degree paved the way for continued educational and diversity and inclusion (D&I) projects with household names including MTV and BBC3.

Ally believes that measuring social impact on the world and conducting business in an ethical way doesn't have to come at the expense of the bottom line, but can increase it.



## 500-YEAR OLD LEGACY

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### A FAMILY THAT BUILDS CONNECTIONS

The idea of the Beacon Gainer icon was inspired by family legacy which extends to Lara's ancestors who designed bridges in Venice during the 16th century, famously winning a competition in 1587 to design and engineer the Rialto Bridge.

Our original logo was a rendering of the Rialto bridge, but its new, more circular iteration better reflects Beacon Gainer's completely new and modernising approach.

A circle completed by its reflection in the water, the bridge reflects the inspiration Lara found from successful business collaboration and connectivity, also echoed in our copper brand colour, copper itself being such an excellent conductor.

We aspire to continue the family legacy to make connections that make a difference. By joining the two sides of wealth management - namely the client to the right advice - we organise with efficiency for the wellbeing of both business and family. And long may both flourish.

Salute!

