



BEACON GAINER

ORGANISED WEALTH FOR YOUR WELLBEING

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WHY BEACON GAINER?

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 both particular aims 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 is wealth indeed, and the beginning of true wellbeing.

GOALS

YOUR 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 you achieve single or multiple life goals, in the short and long-term, connecting the dots between your 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.

BEACON GAINER PORTAL

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

Why are we so sure? Because we have worked hand-in-hand with our clients 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 creates an efficient way to reach a high-quality stream of cross-sector professionals while simplifying the way to identifying and articulating your goals. The portal then acts as a central hub, to be used while working on achieving life 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 your 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.

YOUR PROFESSIONAL ADVISORS

A SELECTION OF INDEPENDENT ESTABLISHED ADVISORS

Our collective of professionals can be accessed easily, through our digital portal and in person. Tailored services, competitive fees and having the ability to acquire advice across multiple business sectors at your fingertips, differentiates our model in the industry. This rounded, responsive and independent approach means you receive multi-disciplinary advice quickly and efficiently.

Beyond expertise and experience, we place great value on a partner firm's values and track record for mindful social impact and good governance. We are actively building a network of businesses who meet the highest standards in environmental and social performance. For example, we bring together Certified B corporations and partners in the UN's sustainability registry to implement sustainable goals to use business as a force for good.

These are the types of advisors we have managing to achieve client objectives, we have selected them because we have worked with them, and their companies have a record and history of good principles.

In short, we connect the dots for your wellbeing.



LARA LEIGH-WOOD

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, attending the French Lycee then St.Mary's Calne, 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, cook, tennis player and skier, forever longing for the slopes of the Swiss and Italian Alps.

HEATHER DARNELL

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.

ETHICAL AND SOCIAL IMPACT AT BEACON GAINER

THOUGHTFULLY SOURCED ADVISORY SERVICES

The independent advisors which is 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 your 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 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 is 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.

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.

WHAT TO EXPECT FROM BEACON GAINER

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 lifestyle, family dynamics and those all-important goals.

A SERVICE THAT INNOVATES TO SUIT YOU

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

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

1. **Plug and Play Advisory** - Organised and tailored for you to plug into the right advisors, to ease the way for your objectives and management of financial affairs.
2. **Project Office** - As it says on the box, your 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 you, for whatever stage in life you're at, our flexible, integrated, modernised approach gives you peace of mind.

Financial peace of mind is not only preserving private wealth.

- 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 FOR CLIENTS

SAVING YOU TIME AND MONEY

It takes time, expertise and understanding to organise and preserve private or shared family wealth. Time you may prefer to spend more pleasurably.

Beacon Gainer was founded on the idea of convenience, simplifying complexities of working towards life goals which require several areas of professional expertise, by conveniently grouping these to suit and fit with your aims, which saves time and money.

5-step journey

1. We meet - in person, or remotely as you prefer - with Lara, our founder to discuss what you'd like to do.
2. We listen - to understand your requirements and objectives, your family dynamics and values, always on-hand, throughout.
3. We acquire, we get everyone onboard and all the dots joined.
5. All communications can be channeled through Beacon Gainer and our digital portal for an easy, single point of contact.
6. You have direct access to your own experts, and wider expertise within their own firms, who think on your behalf and act with total discretion.

Our fee structure

Plug and Play Advisory

- Based on the number of areas of advice needed we tailor a package which is charged on a monthly subscription.

Project Office

- There will be an agreed management fee.

Your Private Office

- There will be a monthly fee, to be agreed.

500-YEAR OLD LEGACY

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!

