

667 BOYLSTON ST, 5TH FLOOR
BOSTON | MA | 02116
INFO@LONEBEACON.COM





Contents

2	What We Do
4	Social Media
6	Email Marketing
7	Data Driven Marketing
8	Content
10	Website Design
12	Branding
14	Broadcast
15	Online Web Event Production



What We Do:

We connect a generation of people who need financial help to the institutions, manufacturers, and advisors that can help them.



1 WE BUILD A WEBSITE

- SEO
- DESIGN
- FUNCTIONALITY



2 WE FUNNEL LEADS

- FACEBOOK MARKETING
- BROADCAST
- SOCIAL MEDIA CAMPAIGNS



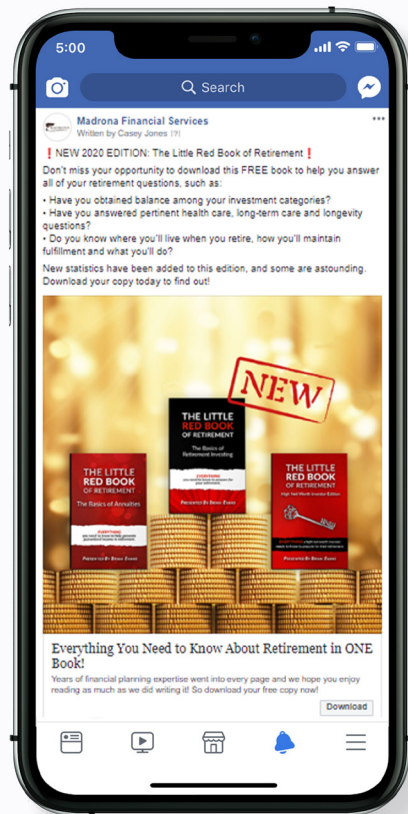
3 WE ENGAGE AND CONVERT PROSPECTS

- EMAIL MARKETING
- CONTENT CREATION
- MARKETING AUTOMATION
- PROPRIETARY SCORING ALGORITHM



SOCIAL MEDIA

Each year Lone Beacon creates and manages 1000s of Custom Campaigns across social media platforms. We build campaigns to generate leads for events, to promote downloadable content, to increase web traffic, and influence direct response campaigns



SOCIAL MEDIA ◀ ADVERTISING




▶ SOCIAL MEDIA MARKETING

73 Million
Baby Boomer
Population

24% Active
Baby Boomer's
On LinkedIn

68% Active
Baby Boomer's
On Facebook

▶ PAID SEARCH



Is your
tax bill
ERODING
your
retirement
income?

START INVESTING WISELY >

Is your tax bill
ERODING
your retirement
income?

START INVESTING WISELY >

 **o'donnell**
FINANCIAL GROUP

THE FINANCIAL MOVES
YOU MAKE COULD HAVE
TAX IMPLICATIONS

START SAVING TODAY >

 **MOORE'S
WEALTH
MANAGEMENT**
"Protecting Your Future"



EMAIL MARKETING

We deliver more
than *2 million*
emails per year.

Email marketing is a tool to keep prospects and clients both engaged and informed. We research extensively so that we are putting the best email possible out there. This includes paying attention to the time of day we're sending, the subject lines and content, optimizing for mobile, and making sure that lists are properly maintained.


(720) 588-2000



Weekly Updates

[Home](#)
[About](#)
[Blog](#)
[Contact](#)



Weekly Blog: 3 Ways to Give Back in Retirement

The holiday season is a good time to think about how you express gratitude. Some people donate their time or money to a charitable organization, or just enjoy the simple...[CLICK](#) to read more.



Opportunity Zone Radio

Step Inside the OZ Radio Show

Want innovative and customized advice to grow your nest egg and reduce or eliminate your tax burden? If you want the opportunity to save with tax-smart investment strategies, create lifetime income streams and plan for a successful retirement, then step inside **The Opportunity Zone Radio Show**.

Join your hosts John Goodhue and Brian Gray **every Saturday at 2 PM on 710 KNUS!**

[Listen Today!](#)



APO UNIVERSITY

Enroll in our APO University Online Courses

At APO Financial, we believe in simplifying our lives so that we have the time to focus on what's truly important. That's why we've designed free educational courses available to anyone who wants to learn more about investing, taxes, retirement and ultimately their legacy.

Visit our APO University platform to learn more about the courses offered and start on your path toward retirement success!

[Click to Learn More!](#)

Get Our Latest Book:

THE BIGGEST TAX BREAK EVER!



Opportunity Zones: The Biggest Tax Break Ever!

Interested in learning more about how alternative investments could fit into your financial plan? Download John and Brian's newest book, *Opportunity Zones: The Biggest Tax Break Ever!* In this book, they offer valuable insights into what an opportunity zone is, how they work, and whether or not they might be right for you. This book covers topics like taxes, deferrals, capital gains, real estate investment trusts, private equity platforms, and more.

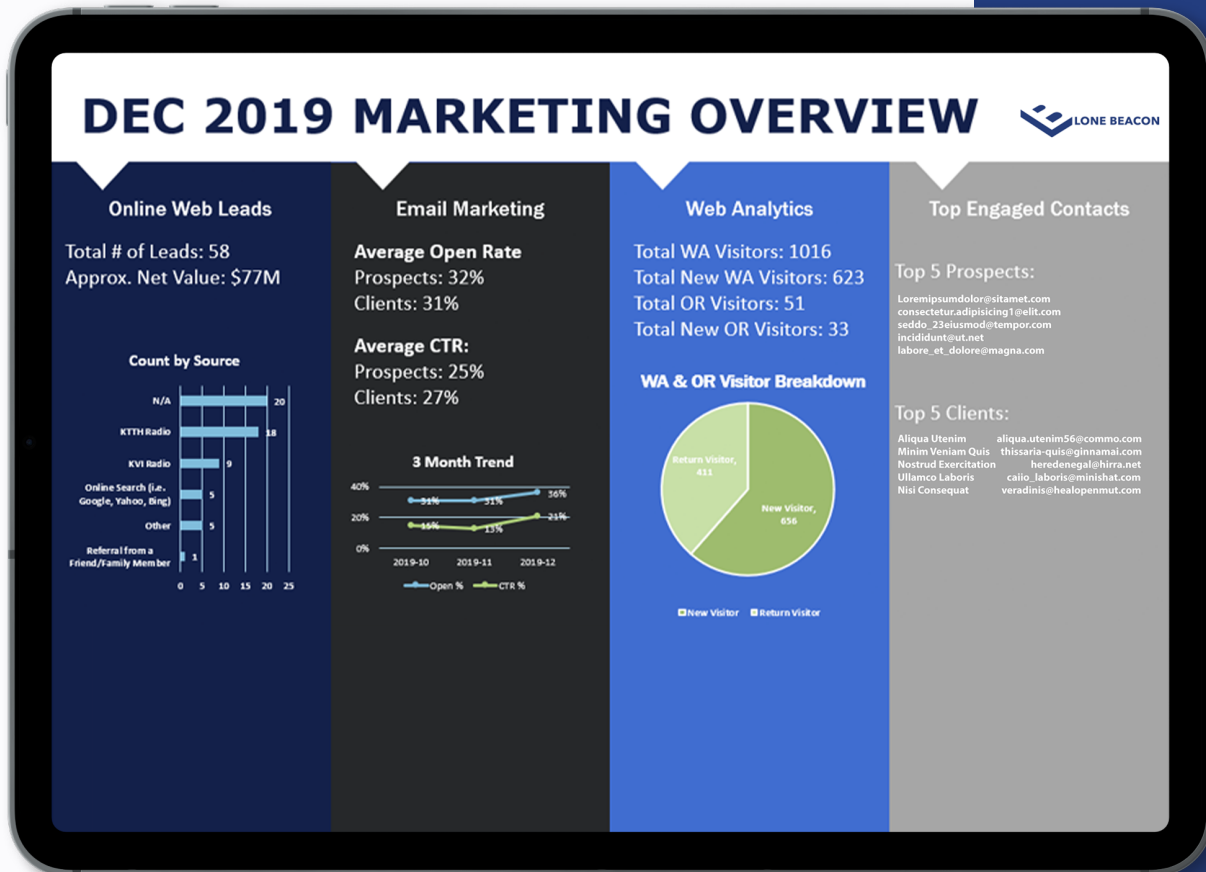
[Download Your Copy Today!](#)

[f](#)
[in](#)



DATA DRIVEN MARKETING

We generate and score nearly
\$3 Billion in leads per year.



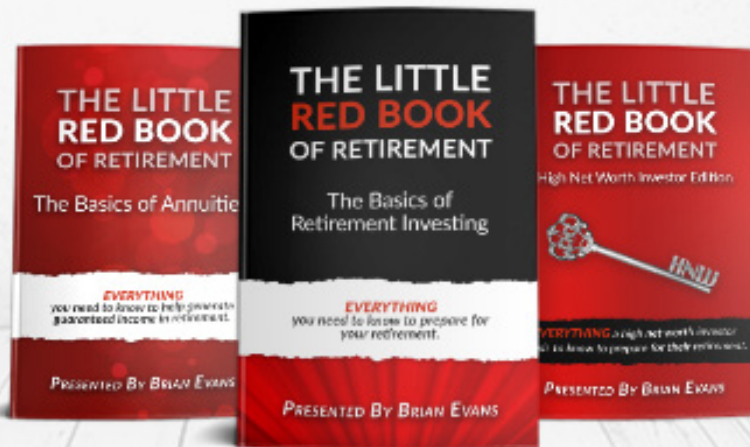
At Lone Beacon we have created a proprietary lead scoring algorithm to collect data on every lead that visits your site. We're able to track these leads' activity and gain important insights into their journey. Our scoring system gives us the ability to pinpoint when a lead is highly engaged and most likely ready to close.



CONTENT

▷ BOOKS AND WHITEPAPERS

Over **10,000**
downloaded books and whitepapers.



▶ BLOG POSTS

More Than **2,000** Social Media & Blog Posts Per Year.



Common Social Security Scams

Fraud Protection, Social Security

Turning 65 means a lot of great things – you're eligible for Medicare, you're at or near yo [...]



When it Comes to Taxes, Plan for Your Future Self

Tax Strategies

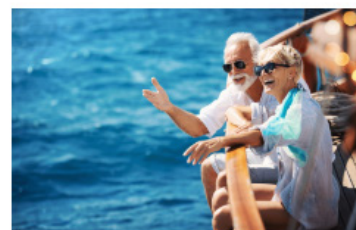
Retirement is a major event that can drastically change your day-to-day life, your financia [...]



5 Essential Items to Pack on Your Next Trip

lifestyle

If you're traveling this summer, or plan to travel often in retirement, there are certain s [...]



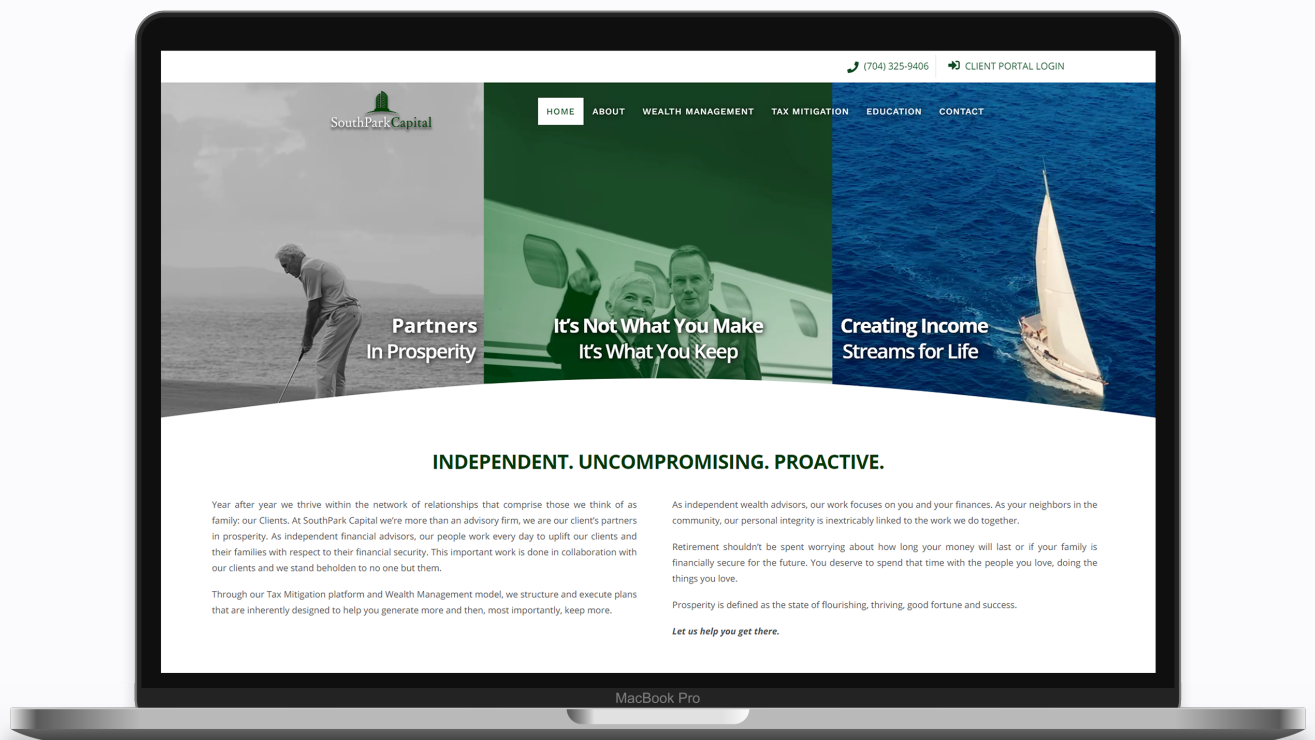
What is Your Desired Retirement Lifestyle?

lifestyle, Retirement

Even though finances are important, life isn't just about money. Rather than have your fina [...]

WEBSITE DESIGN

Nearly 100 Custom Websites for Advisors.



We view your website as your company's storefront. We design your site around your unique strengths and personal brand. Most importantly, we create functional websites that generate leads.



BRANDING

Brogan University

Celebrating 20 Years of Brogan Financial!

Inflation and Your Retirement



Pause (0)

Inflation-protected bond funds saw record inflows in the first quarter that was more than 10 times the quarterly average. What does this mean? Inflation is going to continue to be a hot-button topic. Watch our latest vlog to learn more!

Meet Your Fiduciaries

Meet the pros who are at the forefront of providing a comprehensive financial plan for you and your family.

Matthew J. Ireland, CFP®
Matthew J. Ireland, CFP® is a financial planner with the University of Iowa, where he also earned his Masters in Economics and Accounting. He is also a Chartered Financial Planner and Chartered Financial Consultant. He also holds the Series 65 and 66 licenses.

Tim Kuehl, CFP®
Tim Kuehl, CFP® has a graduate degree from Brock State University and holds a B.A. in Finance, with an emphasis on Investment Management and Securities. He is an experienced and successful financial planner and has been a member of the National Financial Planning Association for over 10 years.

Build Your Blueprint With Us

Designing a comprehensive financial plan is a complex process. To help you get started, we have created a series of guides to help you build your financial blueprint.

VANTAGE POINT FINANCIAL
Where Investments, Taxes, and Financial Planning Align

A Fresh Perspective on Wealth Management

The world is changing faster than ever. It's time to take a fresh perspective on wealth management. We map the journey and guide you every step of the way.

Can your retirement savings afford to take a hit?

"You've worked hard over the years to earn and save it. Now is the time to have a team in your corner to protect it."

-Robin Hoppes, BIG STATE FINANCIAL



Contact Robin Hoppes
(313) 373-8000
BigStateFinancial.com
Robin@BigStateFinancial.com

BIG STATE FINANCIAL

SMART INNOVATIONS FROM FINANCIAL PROFESSIONALS

Is Your Adviser Using Fintech To Better Serve You, or a Larger Roster of Clients?

Smart use of technology can free up your adviser to do more for you. From enhanced communication to personalized options and coaching, the more to get what you're paying for.

By MATTHEW C. PECK, CFP®, CERTIFIED INVESTMENT MANAGEMENT ANALYST
SHP Financial | April 14, 2020

Over the past several years, we've seen breakthrough technology change almost every aspect of our lives. From how we shop, to how we get our news and entertainment, to how we get education. Even how we ask for a ride.

These types of innovations are impacting the financial planning industry as well.

More and more advisers are turning to sophisticated software programs to improve and enhance their client service, allowing them to work more efficiently and increase their productivity.

But what does this mean for the client? If your adviser is no longer performing some of the most fundamental parts of the job, such as portfolio building and regular rebalancing, is he or she using that freed-up time to better serve you... or a larger roster of clients?

That's an important question given the rise in robo-advisors, which tend to cost less than traditional advisers. Robo-advisors typically charge fees from 0.25% to about 0.50% of assets under management per year, depending on the level of account and the services provided. The lowest traditional advisers generally charge 0.5% to 1.0%. If you're getting more from your adviser, you should be getting more for your money.

Here are some things your financial adviser should be able and willing to provide:

MORE COMMUNICATION

Your financial adviser should be a matter of conversation... through individualized results, email, phone, video, or even a simple text or video message. Choose the format or formats that are most comfortable for you, and let your adviser know you expect to hear something on a regular basis. If you want more frequent contact when the market moves especially volatile, make that clear. And the more direct route on the calendar for an occasional face-to-face meeting as well.

MORE PERSONALIZED UPDATES

Your adviser should have about you and your family and be prepared to discuss relevant issues at any time. That might mean proactive advice on estate planning, or how to get the most out of your 401(k) plan, or how to use your Social Security benefits, or what assets your spouse's 529 plan could require. Or a day when discussing a new law or rule change that could affect your savings, income or retirement plan. Tell your adviser what you want the adviser to include in the

SHOULD FINANCIAL

Originally published on [Ergonomics](#)

RETIRE FIT
YOUR FUTURE DEPENDS ON IT!

RetireFitNow.com

FloydFinancialGroup.com

MADRONAFINANCIAL.COM

Finding financial advice

new Day

MOORE'S WEALTH MANAGEMENT
"Protecting Your Future"




Your brand is important to us. Every financial advisor has a unique set of factors, such as different needs and capabilities, competition, regional market, and company position. Branding that considers these factors can positively impact your market presence and marketing activity ROI.

► BRANDING CAMPAIGNS

Once we find the true essence of your brand, we will continue to keep it consistent throughout our marketing efforts, as a foundation to set you apart from your competitors.





Private Wealth Group
PARTNERS IN PROSPERITY

Our work begins with the creation of a customized portfolio specifically designed around your customers. Retirees, business owners, corporate executives and professionals alike enjoy the sense of community and deep understanding that is present when working with our team. Clients often remark that they enjoy doing business the old fashioned way, person to person, and that they feel understood. As your neighbors in the community our personal integrity is inextricably linked to the work we do together. That's why year after year we thrive within the network of relationships that comprise those we think of as family: our clients.

Wealth Management:

- Endowment Model investing - No longer are billions necessary to invest like an institution.
- Classic modern portfolio theory.
- Access to top money managers.
- Access to an array of alternative investments and structured products.¹

Tax Mitigation¹:

- Highly compensated individuals work with us to increase tax efficiency on their regular incomes over \$1M.
- Help business owners increase tax efficiency within their business entities and often can help them leverage pass through income credits they may otherwise be phased out of.
- Specific solutions for owners of appreciated investment real estate.
- Routinely work in support of CPAs, M&A Advisors, Attorneys, Commercial Realtors, Professional Agents and others.

¹Some of these products may only be available to accredited investors.

PRIVATE WEALTH GROUP - ATLANTA
11575 GREAT OAKS WAY SUITE 140
ALPHARETTA, GA 30022

(678) 256-9300

WWW.SOUTHPARKCAPITAL.COM

Disclaimer:
Securities offered through Kalos Capital, Inc. and Investment Advisory Services offered through Kalos Management, Inc., both at 11525 Park Woods Circle, Alpharetta, GA 30005, (678) 356-1100. SouthPark Capital is not an affiliate or subsidiary of Kalos Capital, Inc. or Kalos Management, Inc. Securities offered through Kalos Capital, Inc. and Investment Advisory Services offered through Kalos Management, Inc., both at 11525 Park Woods Circle, Alpharetta, GA 30005, (678) 356-1100. SouthPark Capital is not an affiliate or subsidiary of Kalos Capital, Inc. or Kalos Management, Inc.

There are material differences between the terms under which endowments and individuals can invest in alternative investments. These differences include, but are not limited to commissions and fees, conflicts of interest, access to investment opportunities, size, investment time horizons, and the ability to tolerate illiquidity. There is no standard or exact definition of the endowment model. Portfolio design, specific investments and ultimately performance vary considerably among endowments and investors. Kalos does not claim that any investor will achieve the same result as any endowment, institution, or other investor. Kalos' Investment Adviser Representatives have a conflict of interest when they recommend securities where they earn a commission as Registered Representatives of Kalos Capital. We address this conflict by disclosing the fees and commissions related to the investments recommended to our clients. Also, Kalos representatives do not earn both advisory fees and brokerage commissions on the same assets.

This material is neither an offer to sell, nor a solicitation to buy a security, which can be made only by the Memorandum and sold only by broker/dealers authorized to do so. All potential investors must read the Memorandum, and no person may invest without acknowledging receipt and complete review of the Memorandum. These securities have not been registered under the Securities Act of 1933 and are only made available to individual who meet certain minimum requirements as an "accredited investor" under SEC Rule 501(a). Investors that do not meet these minimum standards are not eligible to participate in Regulation D offerings.

BROADCAST

▷ RADIO PRODUCTION

▷ TELEVISION PRODUCTION & PR

**Produce and Manage Radio and Television
Content Reaching Millions**



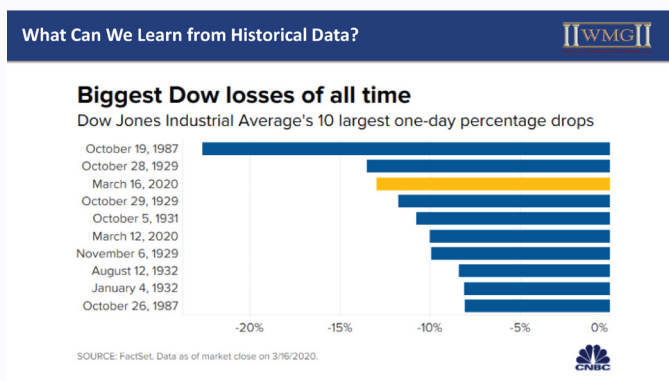
Our foundations began in the broadcast business, which means we know the game inside and out. Our experience, relationships, and attention to detail when it comes to broadcast are just a few of the things that set us apart.

ONLINE WEB EVENT PRODUCTION

We create and deploy custom online events that reach thousands.



WEBINARS ◀



We've moved conventional financial workshops online. This allows for leads to generate without costly mailers, venue rental, and most of all...your time.