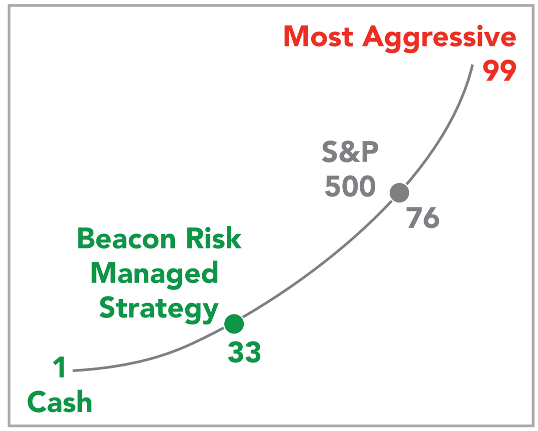
BEACON RISK MANAGED STRATEGY

BEACON
FINANCIAL GROUP

During the income phase of retirement, it is important to evaluate your risk level. Beacon Financial has partnered with the industry leading software company Riskalyze to better help evaluate risk.

It works by utilizing a risk scale from 1-99, 1 being the most conservative investment, cash and 99 being the most aggressive investment available. Did you know that the S&P 500 scores a 76 on the Riskalyze scale?



Let's take a closer look

S&P 500

RISK 76

- 100% equity exposure
- No guaranteed protection

95% PROBABILITY (6 MONTHS)

-16.85% | 0 | +24.29%

VS.

BEACON RISK MANAGED STRATEGY

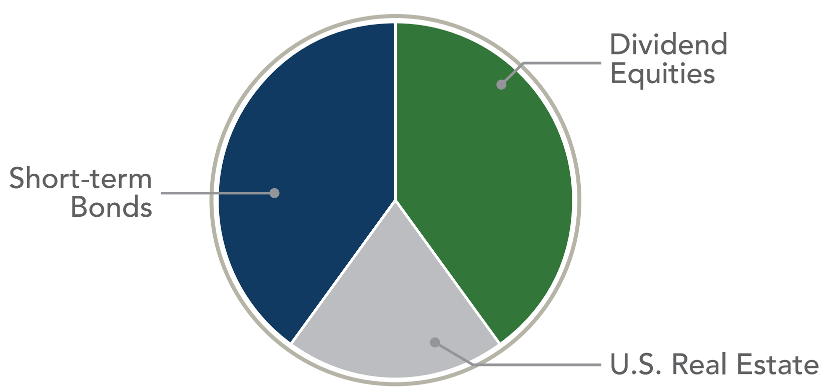
RISK 33

- Less than half the risk of the S&P 500
- Targeted returns of 5-6%
- Estimated 3% dividends paid annually

95% PROBABILITY (6 MONTHS)

-5.13% | 0 | +11.77%

As we can see with the Beacon Risk Managed Strategy, the portfolio targets a 5-6% annual return, with half the risk of the broader markets. The strategy reduces volatility, creates cash flow and pursues growth that is optimal in retirement income planning. **For a complimentary risk analysis, call our office at 972-726-9888.**



DISCLOSURES

The Beacon Risk Managed Strategy example in this piece is based on 40% Short Term Bonds, 40% Dividend Equities and 20% U.S. Real Estate. Risk levels and numbers are generated within the Riskalyze tool as a general model example. Not all client accounts will represent this same asset allocation model as all clients are unique and have their own risk levels. Calculations for this model are based upon composite returns and are assuming that income, dividends and gains have been reinvested. Performance results of the strategy were compiled using Morningstar's Portfolio Manager average yield, are un-audited and have not been independently verified. Beacon Financial Group maintains all information supporting the performance results in accordance with regulatory requirements. All performance results are presented in U.S. dollars. The investment return value will fluctuate, so that an investor's shares may be worth more or less when redeemed. This strategy is designed to provide income and lower risk than the overall market. Securities offered through Kestra Investment Services, LLC, (Kestra IS), member FINRA/SIPC. Investment Advisory Services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS or Beacon Financial Group. Beacon Financial Group is affiliated with Kestra IS and Kestra AS. **Before investing, investors should carefully consider the investment objectives, risks, charges and expenses as well as the underlying investment options.** Asset allocation does not protect against loss of principal due to market fluctuations. It is a method used to help manage investment risk. The Citigroup 3-month Treasury Bill is an index, with income reinvested generally representative of the average yield of 3-month Treasury Bills. You cannot invest directly into the index.

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