

# THE SCIENCE OF INVESTING

Innovative portfolio management solutions



Visit [BeaconInvesting.com](http://BeaconInvesting.com) for access to white papers, blog posts, videos, investment tools and more.

**Beacon Capital Management**  
7777 Washington Village Drive  
Suite 280  
Dayton, Ohio 45459  
866.439.9093  
[info@BeaconInvesting.com](mailto:info@BeaconInvesting.com)

Beacon Capital Management, Inc. is a registered investment adviser. Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies. Investments involve risk and unless otherwise stated, are not guaranteed. Be sure to first consult with a qualified financial adviser and/or tax professional before implementing any strategy discussed herein. Past performance is not indicative of future performance.

Sammons Financial® is the marketing name for Sammons® Financial Group, Inc.'s member companies, including Beacon Capital Management<sup>SM</sup>.



# A FUNDAMENTAL DIFFERENCE

## WHAT IS A “NEXT-GENERATION” MONEY MANAGER?

Well, it's not the status quo. It's not a company who just tells clients to buy and hold and hope as the markets continue to get more volatile. Yesterday's investment strategies don't work in today's economy. We believe there is a better way to meet the investment growth and asset protection needs of today's investors—and Beacon Capital Management is leading the way.

As a next-generation money manager, Beacon provides cost-efficient portfolios designed to capture market gains while limiting market losses. With more than a billion dollars under management, investors are finding and seeking out the benefits our investment strategies can provide.

## INVESTMENT PHILOSOPHY 5 FUNDAMENTAL PRINCIPLES

### 1. Risk Management

Risk is not the only road to return. We believe that strong diversification coupled with proactive risk management solutions leads investors to consistent returns.

### 2. Research Driven

We combine research from Nobel-prize winning scholars, historical data and mathematical formulas to solve today's investment challenges. By looking back while forging ahead, Beacon applies innovative strategies designed to meet investors' changing needs.

### 3. Transparency

We don't buy into the hype of “secret” portfolio structures or strategies, and neither should investors. We are committed to full disclosure and only work with the most trusted financial institutions.

### 4. Customization

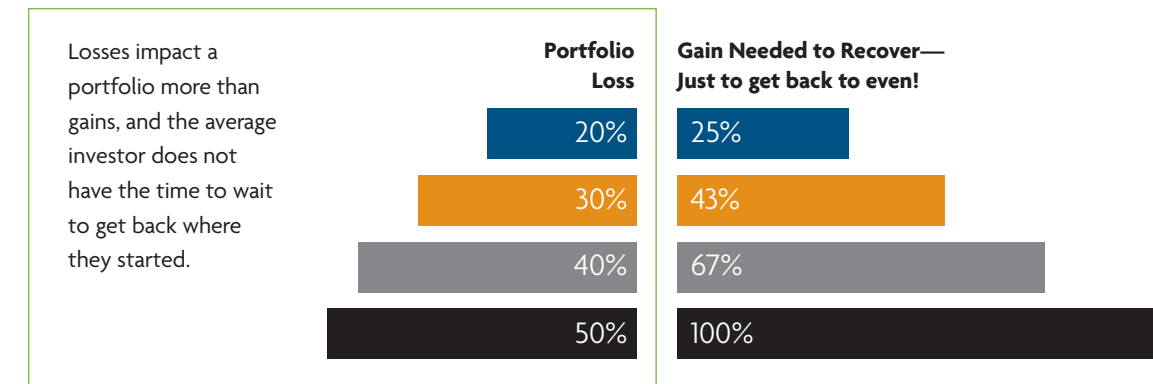
There is no one-size-fits-all investment solution. This is why we offer a variety of portfolio solutions to meet the varying timeline and risk exposure needs of today's investors.

### 5. Mechanical Management

Investing is a science, not a state of mind. Human emotion, hunches and short-lived trends have no role in the management of investments. We set and follow specific investment buy and sell parameters, and then let the process go to work.

## BEACON'S INVESTMENT APPROACH

At Beacon, our goal is to provide investors with consistency. We believe the greatest risk to investors is severe market volatility, resulting in double-digit losses. The time needed to recoup from these losses can be substantial.



## REDEFINING RISK—3 PILLARS TO CONSISTENCY



### Maximize Diversification

Effective risk management begins with strong diversification. No one knows which way the market will go, and overexposure or underexposure to any market sector can dramatically impact the overall performance of a portfolio. We invest equally over the market sectors to help protect from this risk.



### Minimize Losses

Effective risk management attempts to stop investment losses before they become destructive. For this reason we have a stop-loss strategy in place. If our proprietary index drops a predetermined amount, the stop-loss triggers and automatically sells equities within the portfolio.



### Maintain Discipline

Effective risk management eliminates human emotion from the investment equation. Through our mechanical investment management approach, we maintain our discipline and react to changing markets only when our predetermined rules dictate.

## VANTAGE 2.0 PORTFOLIOS

Beacon Capital Management's flagship Vantage 2.0 portfolios are designed and managed with consistency in mind. To learn more about the various portfolio options and which model is right for you, please contact your financial advisor or visit [BeaconInvesting.com](https://BeaconInvesting.com)