



Part 2B of Form ADV: Brochure Supplement

March 31, 2026

Beacon Capital Management, Inc. (CRD 120641)

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John Osier

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8300 Mills Civic Parkway, West Des Moines, IA 50266

Jan Eckstein

Phone: 866-439-9093

7777 Washington Village Dr #280, Centerville, OH 45459

This brochure supplement provides information about John Osier and Jan Eckstein that supplements Beacon Capital Management, Inc's Form ADV Part 2A brochure. You should have received a copy of that brochure. If you did not receive it or if you have questions about the contents of this supplement, please contact us at RIACompliance@sfgmembers.com.

John Osier

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Item 2 –

Educational Background and Business Experience

Education & Designations:

Tippie College of Business, University of Iowa, MBA, 2010

Iowa State University, BS, Finance and Transportation Logistics, 2001

Year of Birth: 1978 | **Years of Investment Experience:** 23

Business Background (past five years):

- 2025 – Present – VP, Portfolio Strategy, Beacon Capital Management, Inc.
- 2023 – 2025 – AVP, Senior Portfolio Manager, Sammons Financial Group Asset Management, LLC
- 2022 – 2023 – Director, Credit Portfolio Analyst, Sammons Financial Group Asset Management, LLC
- 2013 – 2022 – Director, Corporate Credit, EMC Insurance Companies

Item 3 – Disciplinary Information

John Osier has no reportable legal or disciplinary events.

Item 4 – Other Business Activities

John Osier has no outside business activities to report.

Conflicts and Mitigation:

Potential conflicts include time commitment and compensation incentives; Beacon mitigates these through structured reporting, disclosure, and compliance oversight.

Item 5 – Additional Compensation

John Osier does not receive any economic benefit from non-clients for providing advisory services.

Item 6 – Supervision

Supervisor: Emily Damman

Title: President, Beacon Capital Management, Inc.

Phone: 866-439-9093

Email: edamman@beaconinvesting.com

Emily is responsible for supervising John's advisory activities within Beacon's model-based investment approach, including overseeing adherence to the firm's policies and procedures, reviewing model implementation and portfolio alignment, and helping to ensure that recommendations are consistent with the applicable model strategies, client objectives, and the firm's fiduciary obligations.

Jan Eckstein

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Item 2 –

Educational Background and Business Experience

Education & Designations:

Columbia University, MPA, International Economic Policy, 2012

Brown University, BS, Cognitive Science, 2006

Year of Birth: 1967 | **Years of Investment Experience:** 35

Business Background (past five years):

- 2025 – Present – AVP, Portfolio Strategy, Beacon Capital Management, Inc.
- 2014 – 2025 – Chief Investment Officer, Astor Investment Management, LLC

Item 3 – **Disciplinary Information**

Jan Eckstein has no reportable legal or disciplinary events.

Item 4 – **Other Business Activities**

Jan Eckstein has no outside business activities to report.

Conflicts and Mitigation:

Potential conflicts include time commitment and compensation incentives; Beacon mitigates these through structured reporting, disclosure, and compliance oversight.

Item 5 – **Additional Compensation**

Jan Eckstein does not receive any economic benefit from non-clients for providing advisory services.

Item 6 – **Supervision**

Supervisor: John Osier

Title: VP, Portfolio Strategy, Beacon Capital Management, Inc.

Phone: 866-439-9093

Email: josier@beaconinvesting.com

John is responsible for supervising Jan's advisory activities within Beacon's model-based investment approach, including overseeing adherence to the firm's policies and procedures, reviewing model implementation and portfolio alignment, and helping to ensure that recommendations are consistent with the applicable model strategies, client objectives, and the firm's fiduciary obligations.