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Beaumont Wealth Advisors

Managing wealth with an eye toward the future demands vigilance and skill in today's global economy. At Beaumont Wealth Advisors, we take a team approach to financial planning, offering you a broad scope of expertise. Clients are our main priority, which is why we work to understand your unique circumstances and ultimately create a distinctive plan that provides a roadmap for your financial journey.

Specialized Departments

Investment Products

Equities
Asset Management
Mutual Funds
Exchange-Traded Funds
529 Plans
Annuities & Insurance
Fixed Income
Unit Investment Trusts
Options
Alternative Investments
Structured Investments
Closed-End Funds
Institutional Fiduciary Solutions
Sustainable Investing
Equity Capital Markets (Syndicate)
Institutional
Equity Investment Products

Investment Strategy

How To Use Investment Strategy Resources
Investment Strategy Team
Investment Strategy Quarterly
Capital Markets Review
Asset Allocation
Weekly Market Flash
Thoughts On The Market
White Papers
Market & Economic Commentary
IQ QuickView Suite
Thematic Stock Lists
Earnings Blast
Global Insights

Wealth Management

Private Wealth Consulting
Longevity Planning
Financial Planning Consulting
Private Wealth Portfolio Consulting
Trust & Charitable Planning
Concentrated Equity Strategies
Corporate Strategies
Education Planning
Private Institutional Clients (PIC)
Private Wealth Premier Solutions

Cash & Lending Solutions

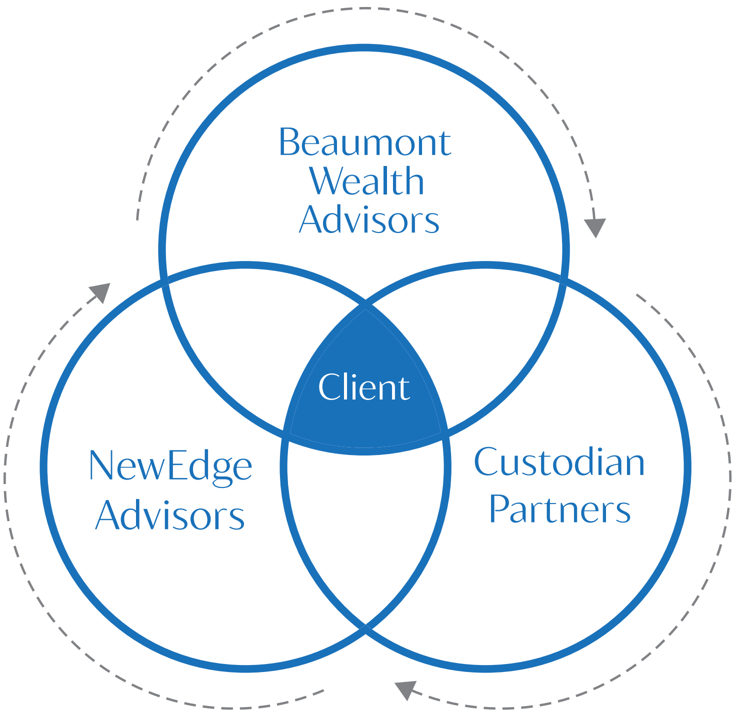
Cash Solutions
Lending Solutions
Current Rates

Customized Portfolio Management

As your trusted partner, we help you pursue your goals by constructing, managing, and monitoring a broadly diversified portfolio that is fully customized to suit your needs. Through clear communication, we help you understand what you own and why, placing your best interests above all else.

- Equity Sleeve
- Fixed Income Sleeve
- Buffered ETF Sleeve
- Custom Structured Notes
- Tax Loss Harvesting

Our Network of Support



Beaumont Wealth Advisors operates an independent practice supported by NewEdge Advisors. The NewEdge platform provides access to various capabilities and resources, including investments, custody, technology, research, and more.

We have access to several reputable custodian partners, including Raymond James, Fidelity Investments, LPL Financial, and Charles Schwab. A custodian is a financial institution that holds customers' securities for safekeeping to minimize the risk of their theft or loss.

Third Party Vendors

Financial Planning Software

eMoney

Digital Life Planning

everplans™

Customer Relationship Management

REDTAIL

Risk Tolerance

riskalyze

Market Research

ZACKS
Our Research. Your Success.

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