

Beck Financial Management

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Where Clients Come First

Fee Only Investment Services

- Beck Financial Management is a fee only investment advisory firm, which means that we receive all of our compensation directly from our clients. We accept no payment - monetary or otherwise - from any other source. All investments are chosen for their quality and value alone, therefore, commissions do not compromise our objectivity.
- Beck Financial Management does not have a parent organization dictating our investment selections. Asset management is our only business and we provide no services that might conflict with our primary responsibility: the creation and preservation of capital.
- Your best interest is the sole guiding force behind all our investment decisions. In our opinion, objectively representing your interests is the only way to achieve and maintain your trust.

Team Members

With many years of experience in the investment world, we offer an advisor relationship built on personal trust and integrity, and serve as a Registered Investment Advisor offering fee-only asset management services. Our highly professional staff will be glad to assist you in building your investment portfolio.

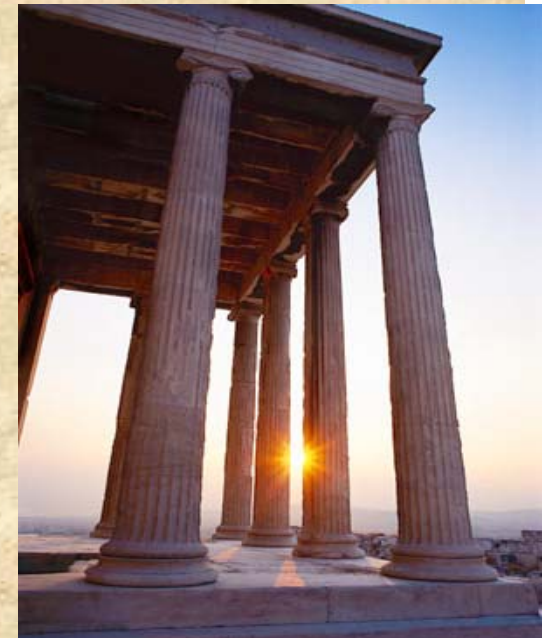
At Beck Financial Management, we are aware that choosing an investment management team is an important and highly personal decision. We seek clients with whom we can build and preserve long-term relationships.

We will make every effort to remain the trusted investment partner you choose to handle your financial needs, based on a disciplined and patient approach to investing.

Let us help you build an attractive investment portfolio.

**All client accounts are individually
housed at
Charles Schwab Company
www.schwab.com**

Planning for Your Future Today



859-331-0500
beckfinancial@gmail.com

BECK FINANCIAL MANAGEMENT

Building a Relationship

We believe that our relationship with you should be built on trust. To reach that level of trust, we promise to never rush you in any decision-making process. By following this 5-step process, we believe we will get to know you and you will get to know us.

Discovery Process

No pressure
Get to know you, your interests and goals

Investment Planning

Evaluate your financial needs and goals, tolerance for risk and investment time horizon

Mutual Commitment

Follow-Up

About 6 weeks after commitment, which gives you time to look over your investment and raise any questions

Regular Progress Meetings

On a quarterly basis, or more often if any changes occur

*“Price is what you pay,
value is what you get.”
Warren Buffett*

Why Choose Beck Financial Experience, Trust and Service

- Assist in defining your objectives and make certain that the investment returns reflect your risk tolerance and income needs
- Asset allocation strategies that can improve the quality and performance of your portfolio
- Quarterly account reporting
- Knowledgeable staff ready to address your concerns or needs
- Regular, objective monitoring of your investments and asset allocation
- Access to an array of quality investment products
- Understanding of your specific tax situation
- Access to a network of professional services to assist your particular needs

Our Investment Philosophy

At Beck Financial Management, we believe attaining attractive long-term results in the stock market is the result of buying and holding good quality, necessary companies, which deliver needed goods and services.

We structure each portfolio to reflect the investor's tolerance for risk and the need for income and liquidity. Preservation of capital and the pursuit of long-term growth is our ultimate goal.

Established on the principle of providing individuals with a sound, patient, and disciplined approach to asset management, Beck Financial Management strives to provide quality service resulting in lasting client relationships.

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***At Beck Financial Management, we are concerned with the return
OF your money as well as the return ON your money***