

FINANCIAL CLARITY

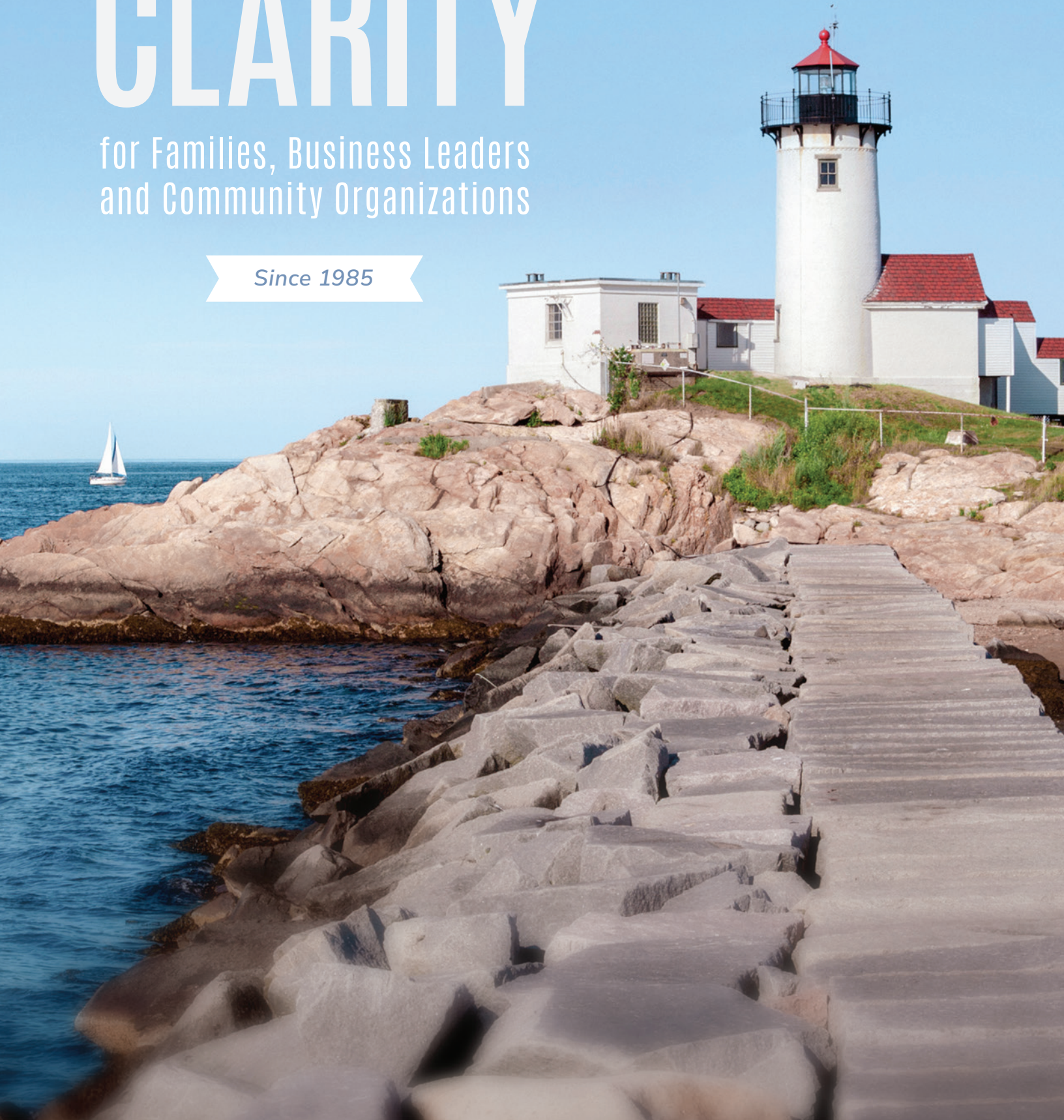
for Families, Business Leaders
and Community Organizations

Since 1985



BEAUPORT
FINANCIAL
SERVICES

WHERE CARE MEETS CRAFT™



CRAFTING A STRONGER FUTURE

Financial Confidence Means More Than Just Security



PLANNING WITH VISION & PURPOSE

You deserve advice that empowers you—whether you're planning for retirement, growing your wealth, or finding new ways to give back. Together, Beauport Financial will help you make confident, purpose-driven decisions that reflect your values and vision.



THE CONFIDENCE TO BUILD A LEGACY

We help you achieve more than financial security—together we can establish a plan to create your true legacy. With our strategic planning and innovative tools, you can maximize your philanthropic impact to make your giving more meaningful yet also financially smart.



BENEFITING OUR WHOLE REGION

A healthy community starts with your success. At Beauport Financial, we know that when you and your business flourish, you strengthen not just your own future—your neighbors and our entire community thrive! It's why we have been guiding individuals, businesses, AND local organizations since 1985.

“WE’RE NOT HERE JUST TO SELL. WE’RE HERE TO SERVE. THAT’S WHAT BEING INDEPENDENT—AND LOCAL—REALLY MEANS.”

— The Beauport Financial Team

YOUR STORY, YOUR PLAN, OUR COMMITMENT

*Financial guidance rooted
in who you are and what
you value.*

A VERY PERSONALIZED PROCESS

At Beauport Financial, everything starts with you. Your values. Your aspirations. Your legacy.

Listening deeply and advising with care is how we help you build a financial life that is about more than just numbers. It's about freedom, family, and the future you want to build.

- **We Listen.** We take the time to understand what matters most—whether it's your family, your business, or your charitable goals.
- **We Design.** Your personalized financial blueprint connects the dots between today's goals and tomorrow's dreams.
- **We Guide.** As your needs evolve, our advice adapts. As your fiduciary, we always focus on your best interest, not a product list.
- **We Implement.** With clarity and confidence, we help bring your plan to life so you can focus on what's most important.

WHAT DO YOU GAIN FROM WORKING WITH BEAUPORT?

- **Financial Planning.** Organize your entire financial life into one living roadmap—so every decision feels intentional, not reactive.
- **Investment Management.** Invest with a strategy tailored to your goals and timeline—not just the market's ups and downs.
- **Estate Planning.** Protect the people you care about and shape a legacy that reflects your values—not just your assets.
- **Life Insurance.** Gain clarity on what you truly need, with a process that grows alongside your life—not one-size-fits-all policies.

A BOLD INITIATIVE— \$100 MILLION FOR CHARITY

At Beauport Financial, we believe the most meaningful wealth is shared. That's why we've launched an ambitious plan to help raise \$100 million in charitable capital for organizations across Cape Ann and the North Shore.

When you work with us, you gain access to our tools and planning strategies to make your giving more impactful—for the causes you care about and the community you love.

**LET'S TURN YOUR GENEROSITY
INTO A LEGACY.**

WHO WE ARE

Beauport Financial Services is a locally owned, independent wealth advisory firm in Gloucester, Massachusetts established in 1985.

Our team is deeply rooted in the Cape Ann and North Shore communities and brings decades of experience guiding clients through life's most important financial decisions—with care, expertise, and a commitment to giving back.

We're proud to be the trusted partner of individuals, families, and business owners who want a team with local expertise backed by nationwide resources and access to global investments.

IT ALL STARTS WITH A CONVERSATION

Whether you're looking for a second opinion, preparing for retirement, or seeking greater clarity across your financial life—we're here to help. Call us today at 978-283-0748 to schedule your free consultation.



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Fee-based planning offered through Beauport Financial Services, LLC, an MA state registered investment advisor. Third-party money management offered through Valmark Advisers, Inc., a SEC registered investment advisor. Securities offered through Valmark Securities, Inc. Member FINRA/SIPC, 130 Springside Drive, Suite 300, Akron, OH 44333-2431, 800-765-5201. Beauport Financial Services, LLC is a separate entity from Valmark Securities Inc. and Valmark Advisers, Inc.