

# Let us act as a beacon for you.

*We help you achieve your financial goals through planning.*

Beacon Retirement Planning Group, Inc. was founded on the principle that our clients' interests always come first. Building on this tradition, we are proud to be at the forefront of the pioneering trend of integrating life planning with financial planning. Our goal is to connect your money to your life. Who you are and what you care about is of paramount importance to the work we do together.

As your Financial Life Planners, we will help you to define and design your unique version of "the rich life". This dynamic team-based endeavor will allow us to develop a comprehensive financial life plan that aligns with your values and priorities, and supports your life goals. It is important to select an advisory firm who truly cares about what is most important to you and understands your needs and aspirations.

***Beacon Retirement Planning Group is ready to serve your retirement planning needs.***



CALL US TODAY AT **855.346.2663!**

## Are you prepared for retirement?

You've probably been planning for retirement in some way, shape or form for many years. As you get closer to retirement, it's important to plan in more specific details. How much money will you have coming in the door every month? Is that money guaranteed or could it fluctuate? How will you spend your money?

**Download our complimentary, no-obligation guide, "10 Steps to a Successful Retirement" to help you nail down the answers to more important questions.**



First

Last

Last

Phone Number \*

Email \*

SUBMIT

**Download your *COMPLIMENTARY* retirement income guide today and start learning more about where you are in your retirement income future!**

## OFFICE LOCATIONS

Carlsbad (Headquarters) | Escondido  
Laguna Hills | San Diego | Scottsdale

p: 855-346-2663 | f: 760-692-0775

© 2018 Beacon Retirement Planning Group, Inc.



## SITE MAP

[Home](#)  
[About](#)  
[Services](#)

---

## Contact

Kelly J. Carter: CA Ins Lic # 0E89958 | Steven A. Conte: CA Ins Lic # 0E36640  
Greg Chick: CA Ins Lic # OD32817

Advisory Services offered through Change Path, LLC an Investment Advisor. Beacon Retirement Planning Group, Inc. and Change Path, LLC are not affiliated.

Licensed Insurance Professional. Respond and learn how insurance and annuities can positively impact your retirement. This material has been provided by a licensed insurance professional for informational and educational purposes only and is not endorsed or affiliated with the Social Security Administration or any government agency. It is not intended to provide, and should not be relied upon for, accounting, legal, tax or investment advice.

Annuities are insurance products backed by the claims-paying ability of the issuing company; they are not FDIC insured; are not obligations or deposits of, and are not guaranteed or underwritten by any bank, savings and loan or credit union or its affiliates; are unrelated to and not a condition of the provision or term of any banking service or activity.

---