



Nancy Beck

CFP®, National Speaker, Founder

Best Selling Author | Award Winning Artist | Music Enthusiast

A Different Kind of Guest

Nancy Beck is a #1 Best Selling Author of THE ART OF THE PLAN, and founder of Beck Financial Strategies, a leading Financial Planning & Wealth Management firm based in Indianapolis, IN. During her 40-year career, Nancy changed her own beliefs around money and found her unique path forward to living her ideal life. She now makes it her purpose to empower others to realize that to achieve the life you want, you have to plan for it. The BFS Way is a unique program designed to get people to their dreams faster with support and partnership. She inspires us all by living the life many only dream of, embracing music, travel and art along with her passion for financial planning, all while residing in Key West, FL six months out of each year.

Plan More ♦ Play More ♦ Be More

Suggested Questions

For audiences with executives, leaders, individuals 50+

- Who should be getting a financial plan and when is the ideal time?
- Why does one need a financial plan and what all does a plan include?
- What is a CFP® and how do we find a competent financial advisor?
- How can we minimize our tax obligations and stay up to date?
- What is legacy planning other than having a will?
- Why is planning for purpose your first step, and why do you believe it is essential to a successful outcome?

For audiences with business owners:

- Why is financial planning so important for business owners and their employees?
- Business owners are busy people, what all is needed to begin a plan?
- For many business owners, the "business" is their retirement. Is that a sound plan?
- How can companies keep employees engaged and educated on the benefits they offer?
- What should be considered in business succession planning?
- How can a managed portfolio bring stability to a business?

Suggested Topics

- Unlocking the 6 Keys to Financial Freedom
- How to Plan for the "Go-Go" Years
- A 401k and a Spread Sheet is NOT a Retirement Plan
- Why Plan More, Play More, Be More is the BFS Way



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