

## Meet Our Team



John Beth Nancy Tony Bethany

We think of you and our team members as

*Family*

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## Introducing THE ART OF THE PLAN A Guide to Financial Success So You Can Play More



Reserve your

*Free Book*

Today



Begin Planning Your Ideal Life Here

Securities offered through J.W. Cole Financial, Inc. (JWC) Member FINRA/SIPC.  
Advisory services offered through J.W. Cole Advisors, Inc. (JWCA).  
Beck Financial Strategies and JWC/JWCA are unaffiliated entities.



*Own your ideal life*

Plan More ♦ Play More ♦ Be More

Nancy Beck, CFP®, CEO and Founder  
40 Years

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## 1. Schedule Discovery Meeting



Money is just money if you don't have

*Dreams & Goals*

## 2. Gather The Data



Having concrete data will ensure your plan is

*Precise & Accurate*

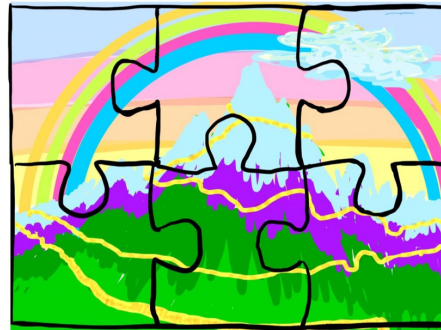
## 3. Build The Plan



For a plan to be relevant it must be

*Comprehensive & Complete*

# 6 Easy Steps



# The BFS Way

## 4. Enroll in BFS Money Site



A personalized website keeps you

*Worry Free & Secure*

## 5. Determine & Implement Solutions



You need more than a spreadsheet to develop a

*Customized Plan*

## 6. Stay Current & Connected



Your wealth should be monitored by a

*Select Team of Professionals*