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# What We Do:

**We connect a generation of people who need financial help to the institutions, manufacturers, and advisors that can help them.**



# 1 WE BUILD A WEBSITE

- SEO
- DESIGN
- FUNCTIONALITY



# 2 WE FUNNEL LEADS

- FACEBOOK MARKETING
- BROADCAST
- SOCIAL MEDIA CAMPAIGNS



# 3 WE ENGAGE AND CONVERT PROSPECTS

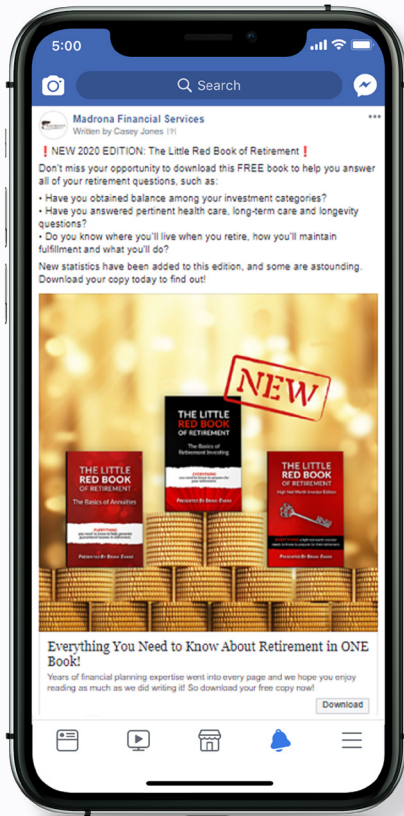
- EMAIL MARKETING
- CONTENT CREATION
- MARKETING AUTOMATION
- PROPRIETARY SCORING ALGORITHM





# SOCIAL MEDIA

Each year Lone Beacon creates and manages 1000s of Custom Campaigns across social media platforms. We build campaigns to generate leads for events, to promote downloadable content, to increase web traffic, and influence direct response campaigns



## SOCIAL MEDIA <

## ADVERTISING




## > SOCIAL MEDIA MARKETING

**73 Million**  
Baby Boomer  
Population

**24% Active**  
Baby Boomer's  
On LinkedIn

**68% Active**  
Baby Boomer's  
On Facebook

▷ PAID SEARCH



Is your tax bill  
**ERODING**  
your retirement  
income?

**START INVESTING WISELY >**

Is your tax bill  
**ERODING**  
your retirement  
income?

**START INVESTING WISELY >**



THE FINANCIAL MOVES  
YOU MAKE COULD HAVE  
**TAX IMPLICATIONS**

**START SAVING TODAY >**





# EMAIL MARKETING

We deliver more  
than *2 million*  
emails per year.

Email marketing is a tool to keep prospects and clients both engaged and informed. We research extensively so that we are putting the best email possible out there. This includes paying attention to the time of day we're sending, the subject lines and content, optimizing for mobile, and making sure that lists are properly maintained.


(720) 588-2000



## Weekly Updates

Home
About
Blog
Contact



**Weekly Blog: 3 Ways to Give Back in Retirement**

The holiday season is a good time to think about how you express gratitude. Some people donate their time or money to a charitable organization, or just enjoy the simple...[CLICK](#) to read more.



**Step Inside the OZ Radio Show**

Want innovative and customized advice to grow your nest egg and reduce or eliminate your tax burden? If you want the opportunity to save with tax-smart investment strategies, create lifetime income streams and plan for a successful retirement, then step inside **The Opportunity Zone Radio Show**.

Join your hosts John Goodhue and Brian Gray **every Saturday at 2 PM on 710 KNUS!**

[Listen Today!](#)



**Enroll in our APO University Online Courses**

At APO Financial, we believe in simplifying our lives so that we have the time to focus on what's truly important. That's why we've designed free educational courses available to anyone who wants to learn more about investing, taxes, retirement and ultimately their legacy.

Visit our **APO University platform** to learn more about the courses offered and start on your path toward retirement success!

[Click to Learn More!](#)



**Get Our Latest Book:**  
*THE BIGGEST TAX BREAK EVER!*

**Opportunity Zones: The Biggest Tax Break Ever!**

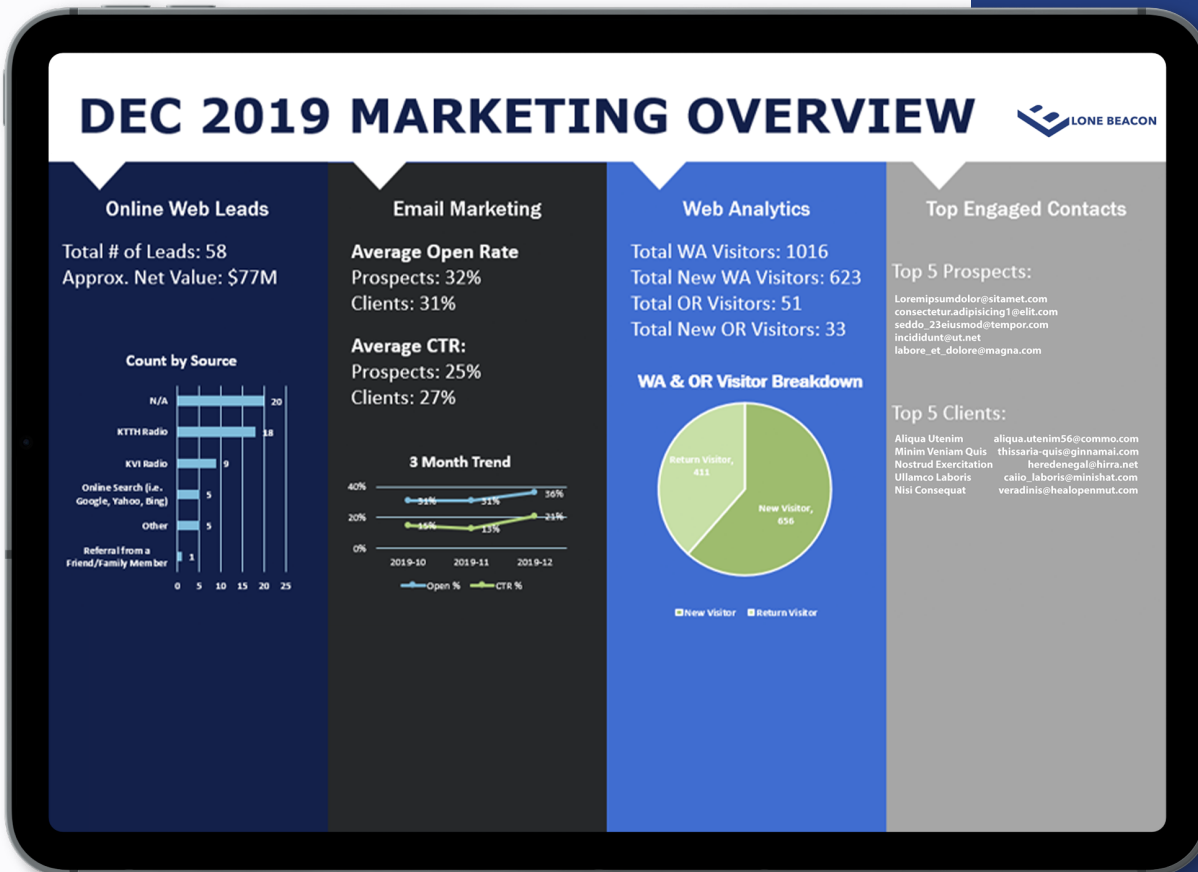
Interested in learning more about how alternative investments could fit into your financial plan? Download John and Brian's newest book, *Opportunity Zones: The Biggest Tax Break Ever!* In this book, they offer valuable insights into what an opportunity zone is, how they work, and whether or not they might be right for you. This book covers topics like taxes, deferrals, capital gains, real estate investment trusts, private equity platforms, and more.

[Download Your Copy Today!](#)



# DATA DRIVEN MARKETING

We generate and score nearly  
**\$3 Billion** in leads per year.

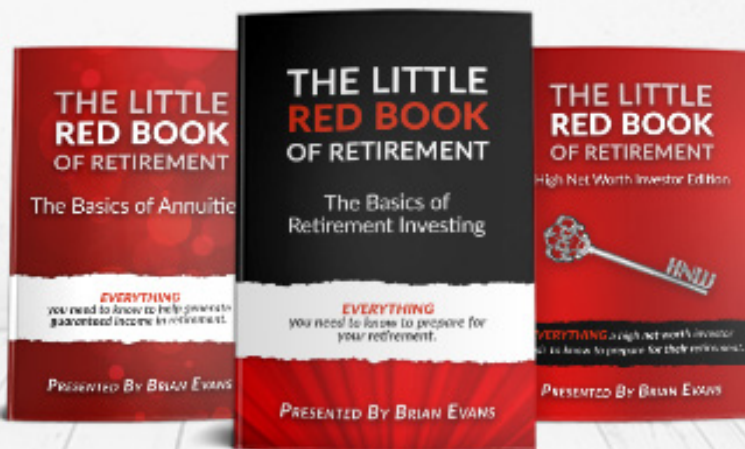


At Lone Beacon we have created a proprietary lead scoring algorithm to collect data on every lead that visits your site. We're able to track these leads' activity and gain important insights into their journey. Our scoring system gives us the ability to pinpoint when a lead is highly engaged and most likely ready to close.

# CONTENT

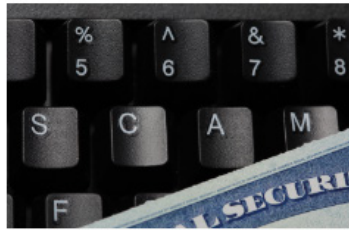
## ▷ BOOKS AND WHITEPAPERS

Over **10,000**  
downloaded books and whitepapers.



▶ BLOG POSTS

More Than **2,000**  
Social Media & Blog Posts Per Year.



Common Social Security Scams

Fraud Protection, Social Security

Turning 65 means a lot of great things – you're eligible for Medicare, you're at or near yo [...]



5 Essential Items to Pack on Your Next Trip

lifestyle

If you're traveling this summer, or plan to travel often in retirement, there are certain s [...]



When it Comes to Taxes, Plan for Your Future Self

Tax Strategies

Retirement is a major event that can drastically change your day-to-day life, your financia [...]



What is Your Desired Retirement Lifestyle?

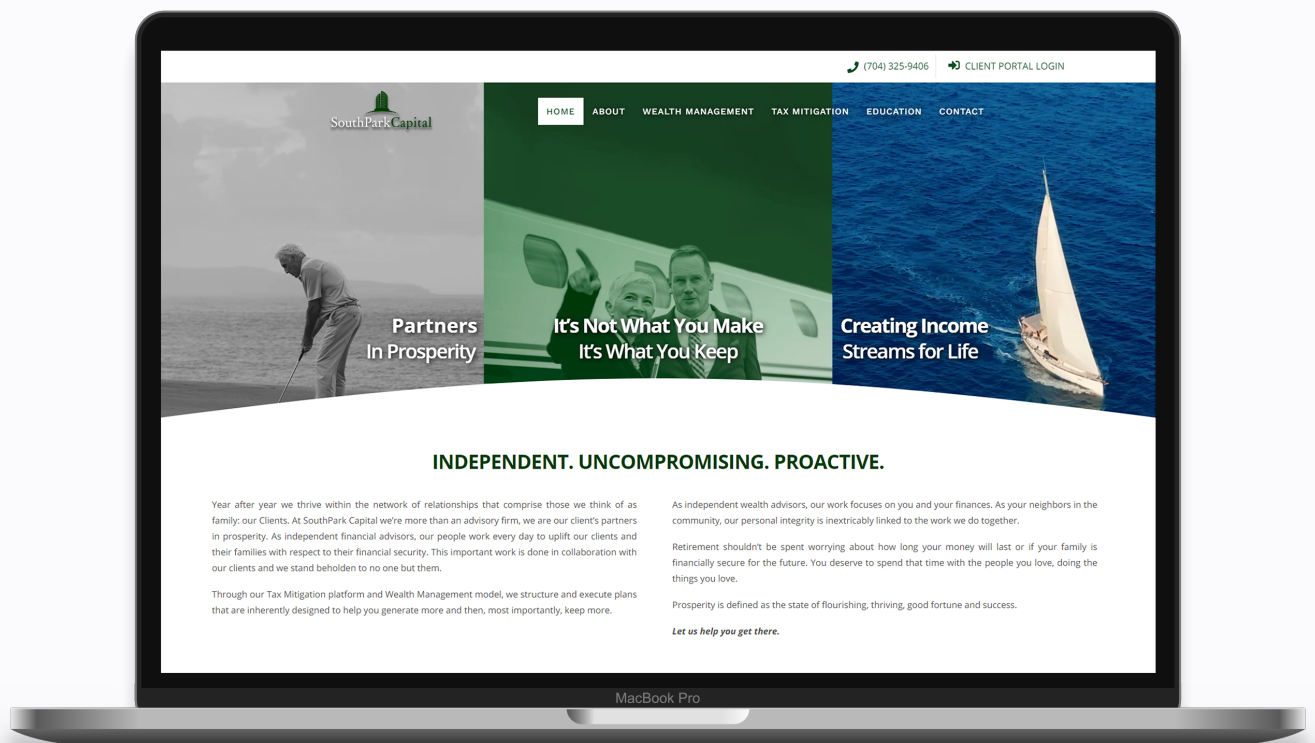
lifestyle, Retirement

Even though finances are important, life isn't just about money. Rather than have your fina [...]

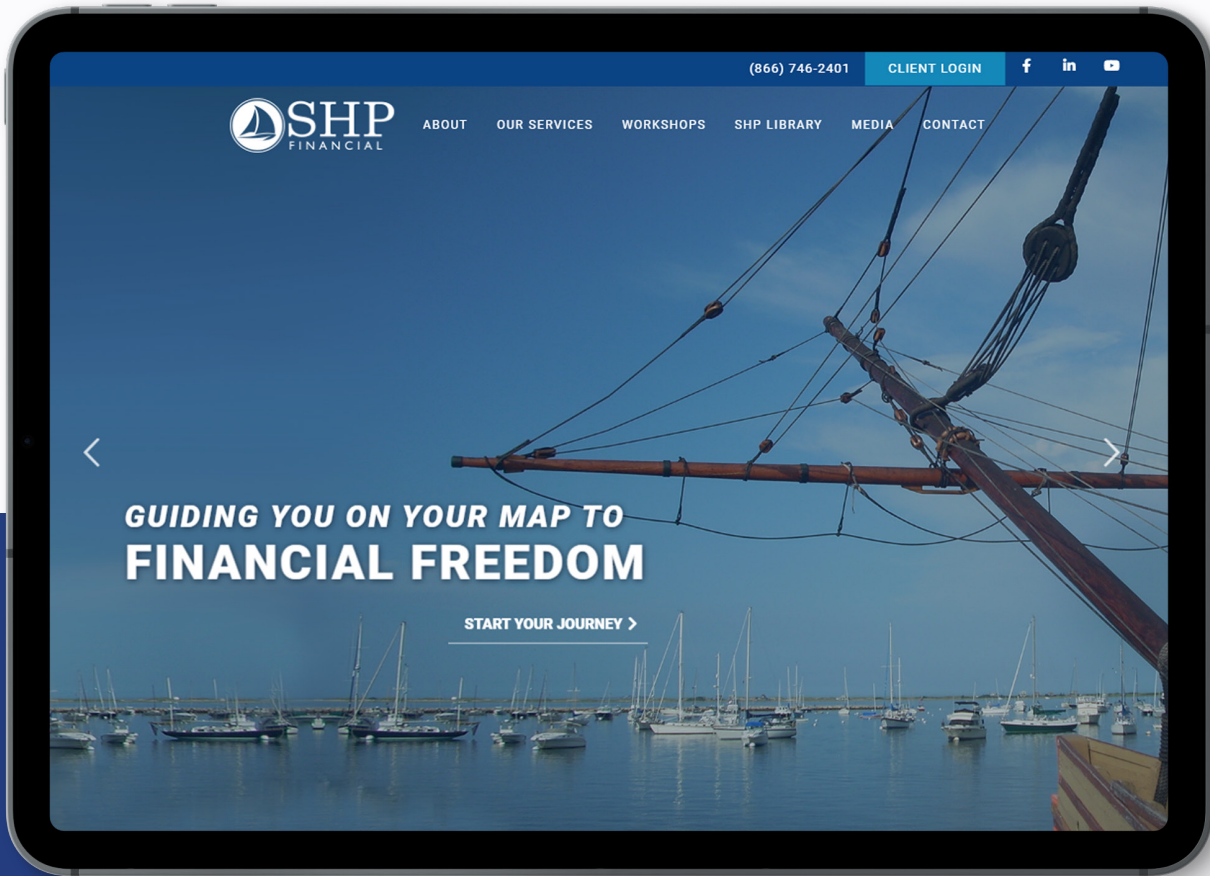


# WEBSITE DESIGN

## Nearly 100 Custom Websites for Advisors.



We view your website as your company's storefront. We design your site around your unique strengths and personal brand. Most importantly, we create functional websites that generate leads.





# BRANDING

## ▶ LOGO DESIGN




Your brand is important to us. Every financial advisor has a unique set of factors, such as different needs and capabilities, competition, regional market, and company position. Branding that considers these factors can positively impact your market presence and marketing activity ROI.

# ▷ BRANDING CAMPAIGNS

Once we find the true essence of your brand, we will continue to keep it consistent throughout our marketing efforts, as a foundation to set you apart from your competitors.





**Private Wealth Group**  
PARTNERS IN PROSPERITY

Our work begins with the creation of a customized portfolio specifically designed around your customers. Retirees, business owners, corporate executives and professionals alike enjoy the sense of community and deep understanding that is present when working with our team. Clients often remark that they enjoy doing business the old fashioned way, person to person, and that they feel understood. As your neighbors in the community our personal integrity is inextricably linked to the work we do together. That's why year after year we thrive within the network of relationships that comprise those we think of as family: our clients.

**Wealth Management:**

- Endowment Model investing - No longer are billions necessary to invest like an institution.
- Classic modern portfolio theory.
- Access to top money managers.
- Access to an array of alternative investments and structured products.<sup>1</sup>

**Tax Mitigation<sup>1</sup>:**

- Highly compensated individuals work with us to increase tax efficiency on their regular incomes over \$1M.
- Help business owners increase tax efficiency within their business entities and often can help them leverage pass through income credits they may otherwise be phased out of.
- Specific solutions for owners of appreciated investment real estate.
- Routinely work in support of CPAs, M&A Advisors, Attorneys, Commercial Realtors, Professional Agents and others.

<sup>1</sup>Some of these products may only be available to accredited investors.

PRIVATE WEALTH GROUP - ATLANTA  
11675 GREAT OAKS WAY SUITE 140  
ALPHARETTA, GA 30022

(678) 256-9300

WWW.SOUTHPARKCAPITAL.COM

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*There are material differences between the terms under which endowments and individuals can invest in alternative investments. These differences include, but are not limited to commissions and fees, conflicts of interest, access to investment opportunities, size, investment time horizons, and the ability to tolerate illiquidity. There is no standard or exact definition of the endowment model. Portfolio design, specific investments and ultimately performance vary considerably among endowments and investors. Kalos does not claim that any investor will achieve the same result as any endowment, institution, or other investor. Kalos Investment Adviser Representatives have a conflict of interest when they recommend securities where they earn a commission as Registered Representatives of Kalos Capital. We address this conflict by disclosing the fees and commissions related to the investments recommended to our clients. Also, Kalos representatives do not earn both advisory fees and brokerage commissions on the same assets.*

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# BROADCAST

▷ RADIO PRODUCTION

▷ TELEVISION PRODUCTION & PR

**Produce and Manage Radio and Television  
Content Reaching Millions**



Our foundations began in the broadcast business, which means we know the game inside and out. Our experience, relationships, and attention to detail when it comes to broadcast are just a few of the things that set us apart.

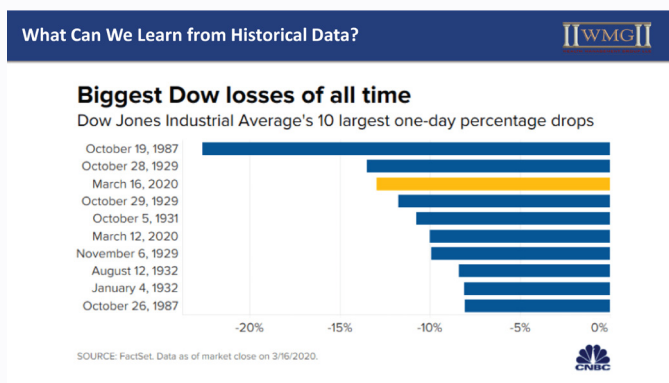


# ONLINE WEB EVENT PRODUCTION

We create and deploy custom online events that reach thousands.



WEBINARS ◀



We've moved conventional financial workshops online. This allows for leads to generate without costly mailers, venue rental, and most of all...your time.