



# Women, Wallets & Wealth

---



New Jersey State Federation of Women's Clubs  
of GFWC Annual Convention  
"Everything Old is New Again...Again"

May 6, 2014

Presented by Mark S. Germain, CFP®, MBA, ADPA®  
and Tina Powell of Beacon Wealth Management

## Women, Wallets & Wealth

The creation of wealth is a systematic process that takes time and nurturing. The earlier one starts the better however, it is a course that is rarely taught or discussed in school. Women who create and sustain wealth in their lives have mastered a set of guiding principles and practice them each day. You too can follow these same strategies and take charge of your future while avoiding the pitfalls.

Women, Wallets, & Wealth is a hands-on workshop created by 2 top wealth management professionals currently in the industry. The purpose of the workshop is to help women maximize their financial outcomes by providing an easy-to-follow framework, based on actual results:

- Step-by-step plan to create your own personal wealth
- How to organize your information for time and efficiency
- How to set goals that increase your probability for success
- The 7 essential habits of high-net worth women anyone can master
- Bonus "extras" you can take with you

This workshop is led by Mark S. Germain, CFP®, MBA, ADPA® – Founder and CEO of Beacon Wealth Management and Tina Powell – Director of Business Management.

Phone: (201) 447 – 9500 | Toll-Free: (866) 403 – 6310 | Fax: (201) 447 – 6226

505 Main Street, Suite 214 | Hackensack, New Jersey 07601 | [www.beaconwealthmanagement.com](http://www.beaconwealthmanagement.com)



### **Biographies**

#### **Mark S. Germain, CFP®, MBA, ADPA® - *Founder and CEO, Beacon Wealth Management***

Mark is a Certified Financial Planner™ and Accredited Domestic Partnership Advisor™ with over thirty years of experience giving advice to individuals and companies. His career highlights started with the "Big Eight" accounting firm of Touche Ross and Company, (Deloitte and Touche currently). As a Management Consultant, Mark was considered an experienced professional in Municipal Bond Finance and counseled clients on financial reporting strategies and strategic planning. As a financial adviser, Mark has built strategies for private and public corporation executives, educated professionals on all facets of asset and wealth management, implemented strategies to help increase wealth, reduce taxes, and increase family wealth. After completing his BS in economics and accounting, Mark did his graduate work in finance and taught accounting at Northeastern University. He keeps contemporary as an adjunct professor at Fairleigh Dickinson University teaching future CFP® candidates the financial planning process. A relentless tactician, Mark meets with his clients to determine strategy changes, liquidation potential, cash flow requirements, and tax strategy implementation. Mark stresses to all clients that investment is a slow yet steady art that requires a written policy and adherence to guidelines.

Mark Germain was recipient of the 2011 Southern Connecticut State University Distinguished Alumni Award where he currently serves on the Business Advisory Council for the School of Business. He has been named one of Worth Magazine's leading wealth advisors, featured on Fox Business School and published in the Journal of Medical Economics.

#### **Tina C. Powell – *Director of Business Management, Beacon Wealth Management***

Tina Powell is Managing Member and Director of Business Management for Beacon Wealth Management, LLC, a registered investment advisory firm located in Hackensack, NJ. In this role, Tina is responsible for managing Beacon's marketing, communications, and social media outreach. With over 20 years of experience across marketing, communications, digital and social media, Tina has helped many women, entrepreneurs, business owners and C-suites find fresh ways to promote and connect. Prior to joining Beacon in 2010, she owned and operated Powell Graphics, a full-service marketing and communications firm serving the hospitality, financial, legal, fitness, and construction industries.

Tina currently serves on the TD Ameritrade Institutional Advisor Panel and Fairleigh Dickinson University Board of Governors Alumni Organization, where she earned a B.S. in Business Management, magna cum laude. In 2013, Tina received her M.A. in Graphic Communications Management and Technology from New York University and the program's prestigious leadership award.

In 2013, Tina introduced the Financial Boot Camp for Women series to Beacon - designed to help women maximize their financial outcomes and improve their lives. She also started her own personal blog SheCapital. Tina is a member of Toastmasters International and an active mentor and speaker. Her presentations are original and engaging with titles like: Twitternomics, LinkedIn Gangnam Style, and Women, Wallets and Wealth. She is a proud mother to a daughter 23 and son 22.

**Phone: (201) 447 – 9500 | Toll-Free: (866) 403 – 6310 | Fax: (201) 447 – 6226**

**505 Main Street, Suite 214 | Hackensack, New Jersey 07601 | [www.beaconwealthmanagement.com](http://www.beaconwealthmanagement.com)**