



BEAUPORT
FINANCIAL
SERVICES

NEWS

FOR IMMEDIATE RELEASE

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DEREK J. REED, CFP®, MANAGING PARTNER OF GLOUCESTER’S BEAUPORT FINANCIAL SERVICES, LLC, HAS RECEIVED CERTIFIED FINANCIAL PLANNER AUTHORIZATION FROM THE CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, THE BENCHMARK IN PERSONAL FINANCIAL PLANNING EXCELLENCE.

To Achieve CFP® Professional Stature, Reed Met the Rigorous Experience and Ethical Requirements of the CFP Board in the Six Core Competencies of Financial Planning.

Gloucester, MA, September 10, 2007... Derek J. Reed, CFP®, a managing partner at the Gloucester, MA based financial services advisory firm Beauport Financial Services (BFS), LLC has met the demanding requirements of the Certified Financial Planner Board of Standards (Board) and has earned the distinguished Certified Financial Planner® status. The Board is charged with upholding the professional standards in personal financial planning. With less than 2000 financial services professionals certified as CFPs® in Massachusetts, this stature serves to ensure that the public has access to and benefits from competent, comprehensive and ethical financial planning. For over a decade Reed has provided investment and insurance services to BFS clients throughout eastern MA. Reed holds the NASD Series 6, 63, 65, 7 and 24 licenses and is now continuing to expand his professional capabilities pursuing the designation of Chartered Life Underwriter, CLU.

Reed takes a holistic approach to the financial planning process gaining a thorough understanding of each client’s complete financial picture. He has particular interest in working with retirees on income planning for their next stage of life. As a CFP® professional, Reed brings a deeper skill set to the six core competencies (estate, investment, insurance, retirement planning, income planning and taxation) to the client relationship.

“Going through the coursework and the exam process confirmed my passion for this work of problem solving clients’ financial issues. I welcomed the challenge knowing a more meaningful and effective client relationship would result through this learning experience,” related Derek J. Reed CFP®, managing partner, Beauport Financial Services. *“My role is to create and protect wealth, and with these CFP™ skills I’m looking forward to this planning process more than ever – it’s an opportunity to create a financial blueprint with our clients’ future...something we can all feel confident about.”*



ARCHITECTS FOR WEALTH STRATEGIES

With a BA degree from Bates College and a commitment to youth, this year he becomes Board President of Pathways for Children in his native Gloucester. Reed resides in Groveland with his wife Karen, a recent Harvard Extension School Master's degree recipient, sons Nathan and Jeremy, and new baby daughter Katherine Rose.

Founded in 1985 by managing partner David S. McKechnie, CLU and subsequently joined by managing partner Derek J. Reed, Beauport Financial Services, LLC provides comprehensive personal and business wealth management services. The firm is affiliated with Ohio based ValMark Securities, a leader in the financial services industry. Based in Gloucester, Massachusetts, Beauport Financials' client base primarily encompasses the North Shore and Greater Boston. ■