



BEAUPORT
FINANCIAL
SERVICES

NEWS

FOR IMMEDIATE RELEASE

CONTACT: PETER MINASIAN
MINASIAN COMMUNICATIONS
978.526.9171
peter@minasiancommunications.com

DAVID S. McKECHNIE, CLU, IS NAMED “INVESTMENT PROFESSIONAL OF THE YEAR”. THE MANAGING PARTNER OF GLOUCESTER’S BEAUPORT FINANCIAL SERVICES IS CITED FOR ACCOMPLISHMENTS IN FINANCIAL SERVICES IN 2007 THROUGH THE FIRM’S AFFILIATION WITH VALMARK SECURITIES.

Industry Recognition Creates Opportunity For A Charitable Association Between Beauport And ValMark Securities Benefiting The Programs Of The YMCA of the North Shore And Shriners Hospital for Children in Boston.

Gloucester, MA, June 17, 2008... David S. McKechnie, LLC, managing partner of Gloucester based Beauport Financial Services (BFS) was recently honored in London, England by Ohio based ValMark Securities, a leader in the financial services industry and a member of the FINRA. From a nationwide network of 105 independent, affiliated financial services firms in 26 states, each carefully chosen as a “member firm” for qualities of exemplary productivity and scrupulous ethical standards, ValMark named McKechnie “Investment Professional Of The Year” for the third consecutive year for his achievements benefiting BFS clients, and the firm’s goals for growth through Beauport’s signature *advisory approach* to financial services.

As a result of McKechnie’s achievement through ValMark, and given Beauport’s commitment to community service benefiting youth and families, the financial services firm matched a charitable cash award from ValMark and presented a checks totaling \$10,000 to the YMCA of the North Shore (“Y”), and The Shriners Hospital for Children in Boston (Shriners). McKechnie chairs the development committee for the “Y”, and is Vice-Chairman of the Shriners’ Board of Governors.

“In naming Beauport Financial Services’ David McKechnie the ‘Investment Professional of the Year’ for 2007, for the third consecutive year from our select group of 105 elite, independently owned firms across the United States, we recognize his uncommon standards of professionalism, commitment to excellence and dedication to community service for our neediest neighbors, values shared by all ValMark affiliates. Through this accomplishment, ValMark has donated \$5,000 to two organizations in which David actively participates, the Shriners Hospital for Children in Boston and the YMCA of the North Shore,”* announced Larry J. Rybka, president and CEO, ValMark Securities. *“Through David’s leadership and vision, Beauport has become an exemplary model of what can be achieved in providing truly independent advice in partnering with his clients. I am proud to call him both a valued colleague and friend.”* ➔

ARCHITECTS FOR WEALTH STRATEGIES

“The work ethic and standards for service that my colleagues provide our clients everyday has given me the opportunity to dedicate my time to a singular focus...to achieve the clients’ and the firm’s goals while having a meaningful role in community service. Therefore, this recognition is proudly shared with the Beauport team,” explained, David S. McKechnie, CLU, managing partner, Beauport Financial Services. *“And, it is especially gratifying to receive this recognition for three consecutive years from noted peers for special standards of achievement in providing services in which I believe.”*

McKechnie’s expertise in financial services emphasizes investment, estate and retirement planning. He holds CLU status—a Chartered Life Underwriter—the highest professional standing in life insurance. Among his professional accomplishments are series 7 & 24 licensures with the Financial Industry Regulatory Authority, and is Insurance Licensed for Life, Accident and Health, and Annuity services and products. As a qualifying member of the Million Dollar Round Table for twenty consecutive years, the premier association for financial professionals, McKechnie has been named to their highest designation of achievement, “Top Of The Table”, twice, most recently in 2007.

A notable dedication to community service has brought McKechnie leadership roles in addition to Shriners and the “Y”; Past President, Gloucester Rotary International; Past President, Cape Ann YMCA Board of Directors, and each year the McKechnie family teams with ValMark Securities members to make improvements to the Westhaven Orphanage in Copes, Jamaica, and will again this December.

McKechnie resides in Gloucester with his wife, Elaine and their children, Connor and Ryan.

ValMark Securities, a privately held Broker-Dealer based in Akron, Ohio and licensed in all 50 states, was founded in 1963 with the concept to empower financial professionals to build independent businesses under their own brand. Today, ValMark Securities continues to provide securities services to its member firms while, ValMark Advisers, a SEC Registered Investment Advisor, works through and provides its 105 affiliated, highly-productive, ethical and independent wealth transfer member firms with elite, third-party money management services and securities.

Founded in 1985 by managing partners David S. McKechnie, CLU, and subsequently joined by managing partner Derek J. Reed, CFP®, Beauport Financial Services, LLC provides comprehensive personal and business wealth management services employing an advisory approach to solving the needs, and accomplishing the goals of individuals, businesses, and organizations. The firm’s dedicated focus to building client relationships; their personal approach in understanding a client’s exacting needs is designed to guide and enable them to make informed decisions resulting in a custom financial plan. The depth of experience and expertise of the Beauport team is further enhanced by its affiliation with ValMark Securities, providing elite third party money management services. Based in Gloucester, Massachusetts, Beauport Financials’ client base encompasses Boston’s North Shore, and Greater Boston. ■