Beacon Rock Wealth Advisors

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Your wealth is a journey

Let our experience guide you.

At Beacon Rock Wealth Advisors, we believe that your financial life is a journey, one that is made easier when you have a seasoned guide by your side--showing you the course and keeping you on track. Whether your needs are for an individual or family financial plan, estate or retirement planning services, or you are looking for help in business planning, we put our experience to work for you. Communication is the foundation of your relationship with Beacon Rock. Together we will determine your needs and design a plan to achieve your financial goals. Providing you with personalized service is our top priority.

Our Services

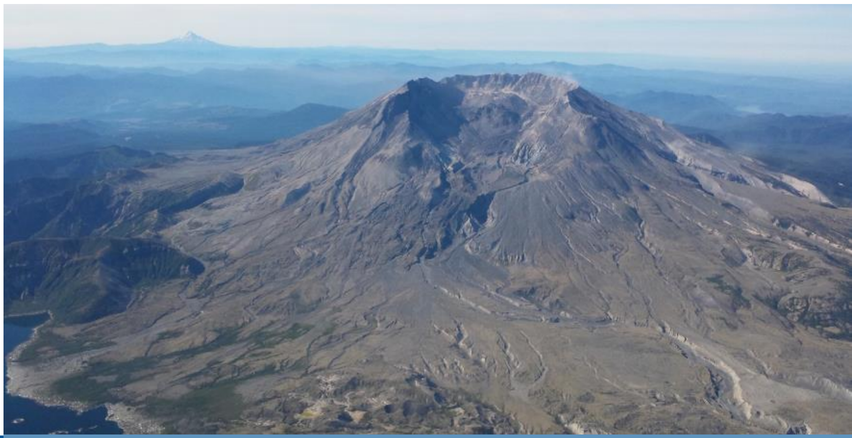
Financial Planning

We approach financial planning from seven aspects. To address these goals, we utilize the financial planning process as laid out by the Certified Financial Planner ™ Board of Standards.

Investment Management

Our team provides risk-adjusted returns with no constraints, commensurate with our clients' goals and experience. Once we learn your tolerance for risk, we select appropriate asset classes and suitable investments that will increase net worth, minimize taxes, provide consistent returns, and preserve purchasing power. When you partner with us, you can be assured that we will continuously work with you to provide meaningful rewards through prudent investments.

The biggest advantage we have as financial planners and investment managers is that we are also business owners. We have learned what it takes to start and build businesses. When we look at an investment, we look at it with an eye toward things like market size, profit margins, and return on investment. And when we recommend a course of action for a business or property owner, it is one that we have researched for our use.



Insurance Services

We can assist our clients with any and all of the following:

- Fixed Annuities
- Life Insurance
- Disability Insurance
- Long-Term Care
- Buy Sell Agreements
- Split Dollar Life Insurance

Residential Real Estate Loans

Through our relationship with Mortgage Window, Inc. (NMLS 2485156) in Vancouver, WA, we originate both residential and reverse mortgages in the states of Washington and Oregon.

Experience

Bill Roller, CFA, CFP®, CMT

Bill Roller founded Beacon Rock Wealth Advisors / BR Capital Inc. in 2003. For over 25 years, Bill has focused his consulting practice on estate, retirement, and financial planning for businesses and individuals. Prior to financial planning, he worked in high technology and was a finance and marketing analyst for an avionics manufacturer and a medical software company. He served for seven years as a U.S. Army officer in Infantry and Special Forces (Green Beret) units.

Bill is a Chartered Financial Analyst, a CERTIFIED FINANCIAL PLANNER™, and a Chartered Market Technician. He has been licensed as a mortgage broker since 2004 (NMLS#107972). He is also a licensed Commercial Pilot of single and multi-engine airplanes. Bill earned a Bachelor of Science degree from the United States Military Academy at West Point in 1982, and a Master of Business Administration (MBA) degree from the Wharton School of Business of the University of Pennsylvania in 1991.

Mike Elerath, CFP®, CLTC, NSSA

Mike Elerath is a Wealth Advisor at Beacon Rock Wealth Advisors. With experience in banking, securities, insurance, and real estate, Mike has worked in financial services for over 25 years. As a business owner, he has applied his experience in working with closely held (family and privately owned) businesses, providing valuation, succession, business sale and estate planning advice. As an investor in commercial, retail, and multi-family properties, he uses his experience to analyze client real estate investments and assist in repositioning real estate for retirement and estate planning.
Mike is a CERTIFIED FINANCIAL PLANNER™ as well as a National Social Security Advisor. He is also certified in Long-Term Care. He earned a Bachelor of Business Administration degree from the University of Oregon and an Associate of Applied Science (AAS) degree in Paralegal Studies from Portland Community College.

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