A typical financial planning interaction will entail a discovery dialogue with a family member who handles the financials. Often a non-financial member will only be included in portions of the discovery process yet if included in the entire process they can provide valuable insights to refine, challenge, or affirm the process. At Waypoint Capital Advisors we believe the numbers are critically important but only when married with a broader understanding of what's important beyond the numbers.

Informally we help each client pre-experience their ideal life destination, which is a confluence of where their financial assets intersect their real life circumstances. We set up waypoints along the way so they are able to see and achieve measurable milestones on their journey. Our lives are fluid and because Waypoint Capital Advisors proactively coordinates activities among your advisory team we're aware of changes that need to be implemented before they occur. By having this attention to detail Waypoint Capital Advisors creates a family office experience where you can focus on the things that are truly important to you. We find in most cases that the family's desired destination is less about the numbers (although important) and more about family, community, or legacy wishes.