Welcome to Waypoint Capital Advisors, a wealth management service company. Waypoint is a navigational term, defined as an intermediate point on a route to a destination. Waypoint Capital Advisors is designed to guide individuals and families on their journey to achieving their financial goals. We work diligently to listen to and know our clients' collective hopes, dreams, and life aspirations. We focus on your financial plan realizing that it is only one component of a successful, secure, and joyful life. We offer a family office experience, designed to incorporate each client's unique, and potentially overlooked, circumstances. Together we set the waypoints that are appropriate for you to be confident, knowing that 'it', whatever that means to you, is taken care of.

The Partners of Waypoint Capital Advisors came together with the shared purpose of providing a family office experience to each of our clients. Our varied technical skillsets and professional experiences are complementary and position us to understand, advise, and service each client. We see in each other the important human traits of honesty, integrity, and hard work which translates through our professional lives. Our mutual respect and trust for each other, as partners, is the foundation of our firm and each client relationship is an extension of our partnership and built on those same values.

Come tell us your family's wealth narrative.

David Baratta, MBA
Jon Kennedy, CFP® MSFS
Mark Pletts, CLU