

In addition to financial planning, clients can engage Waypoint Capital Advisors to manage all or a portion of their assets on a stand alone basis. Waypoint Capital Advisors can provide advice on assets held by the client outside the scope of what is being managed by Waypoint Capital Advisors. Waypoint Capital Advisors can provide non-discretionary investment management advice on positions that are held within an employer-sponsored retirement plan, a specific insurance company product or assets held at another custodian. The client and Waypoint Capital Advisors will agree on what assets the fee will be applied to and from what accounts the fee will be debited from.

Waypoint Capital Advisors tailors its investment advice to each client's individual needs which are captured in the Investment Policy Statement. Waypoint Capital Advisors' initial and on-going client consultations allow us to determine risk, asset allocation and analyze other factors before making a recommendation.