The family office experience starts with the concept of providing independent advice without conflict of interest. Waypoint Capital Advisors works as an advocate for our clients, sourcing products and services, without receiving compensation from these providers as Waypoint Capital Advisors is only paid directly from our clients. Think of us as your very well informed personal concierge in the financial services industry!

Historically this model was only available to a select group of families. Today with technology advancements and Waypoint Capital Advisors' expertise and experience we are able to provide this type of client engagement to a broader group of families.

Waypoint Capital Advisors' model is flexible as we can apply the full scope of family office service to our clients where we act as a central conduit for information, strategy, and execution in all aspects of a family's lives. On the other end of the spectrum we may be a role player in a family's life, acting with a more specific mandate and working alongside other trusted advisors. Our discovery process with each family will jointly determine the proper model for each client.

The family office experience permeates both our wealth management and investment advisory offerings.