

Waypoint Capital Advisors provides ongoing asset management and financial planning services based on a client's individual objectives, which takes into consideration their goals; appropriate time horizons, risk tolerance as well as other factors. Financial Planning Services include, but are not limited to:

- Global Balance Sheet review
- Cash flow analysis
- Tax planning
- Investment Advisory Services
- College funding
- Retirement
- Risk management
- Estate planning
- Charitable planning
- Generational and Legacy consulting