SINGLE POINT PARTNERS

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Wealth Logistics™

PLANNING. STRATEGY. ACTION.

Year-round decision & operational support of your family's financial responsibilities delivered by your Personal CFO

Lo-gis-tics /le'jistiks/ - noun the detailed coordination of a complex operation involving many people, facilities, or supplies

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Learn More About Wealth Logistics

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Our Fee vs. "Their" Fees

Why does it matter how I pay for advice? It's not just about your investments anymore. The complexity around managing your financial life has evolved, its time for the Wealth Management industry to do the same. Wealth Logistics is delivered by your Personal CFO via our fixed-dollar annual fee.

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Wealth Logistics™ vs. Financial Advice

We don't believe in a "financial plan". We believe in financial planning. Planning is a process. Your life is changing everyday. You have decisions to make everyday. In the financial services world, everyone is an "advisor" or "planner" or "wealth manager". With everyone sounding the same, how do you know what you're really getting?

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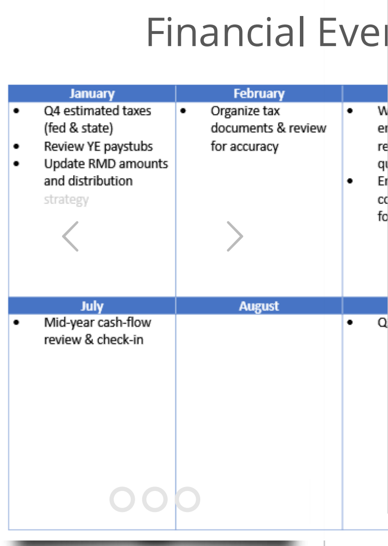

What to Expect

You do not need to uproot your existing financial life and accounts to work with us. First. we get you organized and plug the leaks. Then, we keep you organized via your custom Financial Life Calendar and your SingleView Dashboard.

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Happy Father's Day!

Pretty cool to get to share a story about my dad in this article. He's one of those guys that is always looking for ways to use his talents to help other people - [...]

Single Point was founded for families who strive to make decisions that are better than “good enough”. We provide context and clarity to the planning, investing, and organization of your entire balance sheet. Our flat fee is the cornerstone of our belief that clients shouldn’t have to wonder “what’s in it for their advisor?” when making decisions. We keep hearing from our friends in the industry that this model is the future…we're not waiting!

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