decisionpoint.
CLEAR FINANCIAL SOLUTIONS

Helping you identify, simplify, and accomplish your financial goals.

Fee-Only Financial Planning & Fiduciary Investment Management for Individuals, Families, Businesses, and First Responders.

Who We Serve

Individuals, Families, & Trusts

Financial Planning is *not* an event... It is a process!

So let's worry less about "The Plan" and focus on being continually engaged in the process of planning.

Our Objectives

1

Help you accomplish your goals.

You are your own benchmark, with your own goals, and your own unique challenges. It is our job to personalize a solution that will help you accomplish the goals that matter most to you.

2

Help you find clarity.

Clarity is the peace of mind that comes from organizing, simplifying, and prioritizing your financial life. In all that we do, we want to eliminate confusion & chaos and replace it with clarity by engaging in an ongoing financial planning process.

3

Help you have confidence.

Sleep well, live happy, & have confidence. There is a lot of noise throughout the world and in the financial markets that can cause anxiety and doubt. Let us worry while you enjoy life.

The Planning Process Components

Cash Flow Planning

Investment Management

Retirement Planning

Social Security Optimization

Charitable Giving

Risk Management

Tax Planning

Real Estate

Retirement Plans

Ensuring a successful retirement outcome for every participant in a retirement plan can often be a Plan Sponsor’s greatest challenge... We can help!

Our mission is to provide your employees with the behavioral knowledge, investment options, and financial planning resources that will help each of them to prepare for a successful retirement.

Employer Benefits

1 ERISA 3(38) Fiduciary Liability Mitigation & Relief

2 Investment Selection & Monitoring

3 On Site Education & Enrollment Meetings

4 Semi-Annual Fiduciary Plan Reviews

5 Help Organize & Maintain all ERISA Documentation

6 Ongoing Fee Analysis & Benchmarking

Employee Benefits

1 Coaching & Advice from a CFP® Professional

2 Proactive, Timely, and Relevant Communication

3 Semi-Annual Reviews of Each Participant Account

4 Complementary Financial Planning

5 Professionally Managed Low Cost Investment Portfolios

6 Behavioral Finance Coaching & Education

In the current environment of increased ERISA regulation, DOL plan audits, and retirement plan litigation, Plan Sponsors are looking for ways to decrease their fiduciary liability while at the same time enhancing the retirement plan experience for their employees. To meet these objectives DecisionPoint Financial serves as an ERISA 3(38) Investment Manager and assumes the fiduciary liability for the selection, monitoring, and performance of the investments in your Plan. We also take full responsibility for providing your employees with critical education and regular account reviews. This helps prevent plan participants from making behavioral mistakes that can cost them dearly at retirement. Every plan participant has direct access to a CERTIFIED FINANCIAL PLANNER™ with extensive experience in [...]ng retirement plan participants.

First Responders

We are true financial planning experts dedicated to meeting the unique financial challenges faced by members of the fire service and law enforcement communities.

We have developed a comprehensive financial planning process specifically designed for First Responders and their families. Our Fee-Only fiduciary approach to managing 457(b) deferred compensation plans for the public sector offers non-conflicted investment advice and comprehensive financial planning to our community hero's.

Public Employer & Local Union Benefits

1 Fiduciary Liability Mitigation & Relief

2 Investment Selection & Monitoring

3 On Site Education & Enrollment Meetings

4 Semi-Annual Fiduciary Plan Reviews

5 Ongoing Fee Analysis & Benchmarking

6 Plan Design Analysis

First Responder & Employee Benefits

1 In-Home Financial Planning from a CFP® Professional

2 Proactive, Timely, and Relevant Communication

3 Semi-Annual Reviews of Each Participant Account

4 Complementary Financial Planning

5 Professionally Managed Low Cost Investment Portfolios

6 Behavioral Finance Coaching & Education

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Ready to get started?

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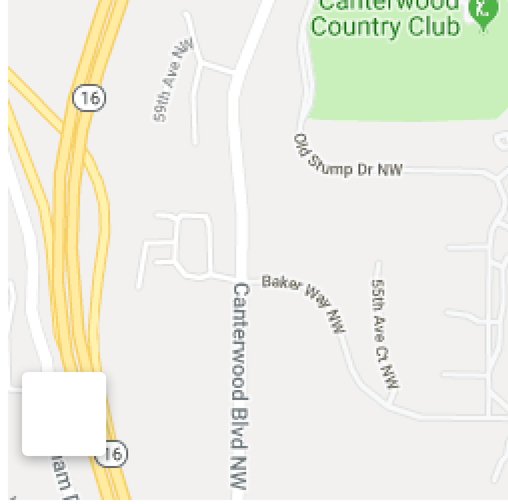

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Disclosures