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500 Capitol Mall, Suite 1060
Sacramento, CA 95814

| Email Us (<mailto:info@towerpointwealth.com>)



TOWERPOINT WEALTH

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Helping clients properly coordinate all of their financial affairs, with the goal of achieving, and then maintaining, their financial independence.

To fulfill our mission, we maintain a dedicated focus on you, our client. While we are unable to guarantee specific financial outcomes, we are confident that our experience, sensibility, discipline, integrity, and individualized approach will help markedly increase the probability of your success in achieving, and then protecting, your financial independence.



(<https://towerpointwealth.com/benefits-of-independence/triangulation-of->

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advice/)

Triangulation of Advice

As an RIA, Towerpoint Wealth promotes what we call the "Triangulation of Advice." ([https://towerpointwealth.com/independent-](https://towerpointwealth.com/independent-financial-advisor-firm/triangulation-of-advice/)

<https://www.facebook.com/TowerpointWealth/>) It means our advice is separated from both where your assets are held and where the products and services we use are created. Towerpoint Wealth, based in Sacramento, minimizes these conflicts of interest by isolating

an important consideration that influences our financial advice.

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strategy/responsible_investing/)

Responsible Investing

Are you curious about or have a more specific interest in responsible investing? Towerpoint Wealth, located in Sacramento, has the resources, expertise, and experience to help you properly construct your investment portfolio to reflect your personal values, without compromising your ability to have a diversified portfolio earning competitive returns.

RESPONSIBLE INVESTING> (https://towerpointwealth.com/sacramento-financial-planning-philosophy-strategy/responsible_investing/)



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[strategy/investment-strategy/](#)

Investment Strategy

The centerpiece of Towerpoint Wealth's investment strategy focuses on setting a strategic asset allocation, and then ensuring we are

disciplined about rebalancing that asset allocation regularly. Sacramento financial advisors will work with clients to construct a disciplined plan and strategy in times of stability, to ensure we do not change it during times of instability.

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Do you have a question
or would you like to speak
to one of our

Sacramento financial advisors (<https://towerpointwealth.com/sacramento-financial-advisor-retirement-plan/>)?



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Please submit your details and we will promptly be in touch. Feel free to email us if you prefer.

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Your Email *

Your Phone Number

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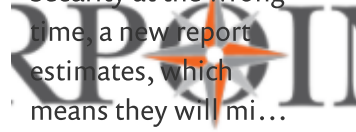
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WEALTH

ESG (Socially Responsible Investing) White Paper

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Why did you decide to move to a fully independent model?

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What services do you provide, exactly?

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What is your approach to helping Towerpoint Wealth clients?

Are you *legally* a fiduciary for your clients?



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We maintain a bias within our [#investmentphilosophy](#) towards owning [#investments](#) that pay current income - [#interest](#) from [#bonds](#) and [#dividends](#) from [#equities](#).

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