

Your life is more than just numbers.

Independent, reliable advice to help you focus on what matters.



Financial Planning

Are you focused on what matters? Our advisors work with you to develop a plan that sets you on your own unique path to success, but is flexible enough to adapt to changes in your life when and how they occur.



Investment Management

Are your investments working for you? We believe in the importance of fundamentals. This means knowing you individually, and designing, monitoring, and managing a portfolio specifically in tune with your needs.

[LEARN MORE](#)



Independent Advice

Whose interests are being taken care of? As fee-only advisors, we always operate under the highest fiduciary standard. That means your success is always at the core of what we do. No exceptions. No exemptions.

[LEARN MORE](#)

LET'S GET STARTED

Comprehensive "Fee-Only" Services



Individuals & Families

- Financial Planning
- Retirement Planning
- Investment Management
- Social Security Planning
- Tax Planning
- Charitable Giving Strategies
- Insurance & Risk Management
- Life Transition Planning



Entrepreneurs & Executives

- Tax Planning
- Retirement Plans
- Buy/Sell Agreements
- Risk Management
- Corporate Finance
- Exit Planning
- Executive Compensation



Major Life Transitions

- Marriage
- Birth
- Adoption
- Death
- Divorce
- Sale of a Business
- Retirement

Basepoint Wealth

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Important Disclosure Information



Let's Talk.

EMAIL

PHONE #

HOW MAY WE HELP?

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SUBMIT

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