BAY POINT
WEALTH MANAGEMENT
Professional Advice. Personal Attention.

TRUE FEE-ONLY FIDUCIARY ADVISORS

To Help You Navigate Through Life

ABOUT BAY POINT

Who We Are

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In the Community

Who We Are

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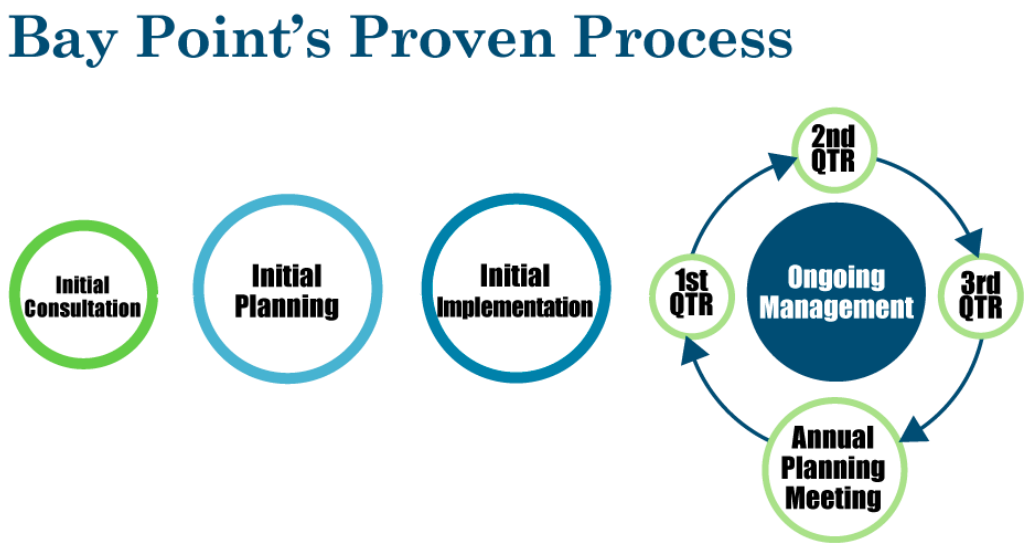
OUR SERVICES

Bay Point's Proven Process

Comprehensive Financial Planning

Investment Management



Bay Point's Proven Process

Our process begins with a free consultation meeting where we get to know a bit about you and your vision and goals. You get to know a bit about us and our process.

If decide you would like to move forward, we begin the initial planning and implementation phase. Over the next several months, we will do a full review of your finances. We will meet 3 to 4 times to discuss our findings and recommendations. We will coordinate with other professionals, such as the attorney, CPA, insurance agent, mortgage broker, etc, to fully implement each recommendation.

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If you are ready to take advantage of Bay Point's proven process, let's get started!

HOW WE HELP

Business Owners

Professionals

Pre and Post Retirees

Those In Transition

BUSINESS OWNERS

As a business owner you will experience unique planning issues as you expand and develop your business. In many cases the majority of your net worth is comprised of the value of your business. Bay Point Wealth Management understands how the ownership of the business becomes deeply intertwined within your personal and family planning needs. We have helped many business owners successfully navigate the unique risks and opportunities that owning a business presents.

Business Planning

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We build close relationships with our business owner clients so we can clearly understand their planning needs as well as their personal and business goals. Our proactive and comprehensive approach helps you plan ahead for success and growth. We make certain that you and your family are taken care of.

While there are many aspects involved with your business planning, there are generally two key areas on which we focus:

- Contingency planning – This provides for the family and the business in the event of the untimely death or disability of the business owner. We plan for the continuity of your business, how your family is going to be taken care of, and who the best people are to sit in your chair and move the business forward.
- Exit Planning – We help you plan for the eventual change in ownership of your business.

- Diversifying assets
- Family dynamics and ownership issues

- Estate planning
- Risk management
- Tax planning
- Retirement planning
- Charitable planning

Bay Point acts as the quarterback, coordinating your planning efforts with your other advisors. We work closely with other professionals, including attorneys, CPA's and valuation specialists - and thus can provide detailed advice in each specific planning area in conjunction with the advice of a complete team. Working shoulder-to-shoulder with us and these other professionals ensures there are no missing links.

If you are a business owner who feels you need to create or improve your plan, or if you have questions or concerns around your planning, please contact us to see how we can help.

Business Owner

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YOUR TEAM

William J. Hufnell, CPA, CFP®

Kimberly K. Anderson, CFP®

Dan Ebinger, CFA

William J. Hufnell, CFP®

Elizabeth W. Yoder

Glenell L. Agnolutto

Christine H. Hufnell

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William J. Hufnell is the founder and Principal at Bay Point. He earned his Bachelor's degree from Georgia State University in accounting and his Master's degree in finance from Johns Hopkins University.

Bill is a Certified Public Accountant (CPA) with extensive knowledge in Federal income tax laws and Federal estate tax laws. He is also a CERTIFIED FINANCIAL PLANNER™ (CFP®), the most highly regarded designation within the financial planning industry. The CFP® designation reflects Mr. Hufnell's extensive experience and education in the financial planning arena, as well as his commitment to continuing education and the CFP® Board's Code of Ethics.

Bill serves as the lead wealth manager and Chief Investment Officer for the firm.

He is an active member of the National Association of Personal Financial Advisors, the foremost professional association for fee-only financial advisors, the American Institute of Certified Public Accountants, and the Maryland Association of Certified Public Accountants.

In addition to his 12 years of extensive wealth management planning experience with Bay Point, Bill was previously employed with a Fortune 100 corporation for 10 years, working in the areas of business planning, corporate retirement plans, employee benefits and compensation, and financial reporting.

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NEWS & EVENTS

Blog Articles

Upcoming Events

Past Events

MARCH 12, 2019

HAVE YOU READ THE FINE PRINT?

MARCH 6, 2019

THE INCREDIBLE DILEMMA

FEBRUARY 27, 2019

GOT ADVICE?

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GET STARTED

Let's Talk

Risk Tolerance Assessment

Initial Consultation Form

We start with a short phone meeting to get acquainted and learn about your situation and needs. We'll also describe a bit about our company and how we can help. To schedule a time with one of our advisors, please use our online calendar below. We look forward to getting to know more about you.

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A brief call with prospects to learn a little more about each other.

< **June 2019** ▾ >

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2	3	4	5	6	7	8
9	10	11	12	13	**14**	15
16	**17**	**18**	**19**	**20**	**21**	22
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30						

MD PREFERRED

CFP®

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DISCLOSURE

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