Great Point Wealth Advisors empowers its clients to make informed decisions regarding their financial future.  As an investment adviser registered with the United States Securities & Exchange Commission, we are legally bound fiduciaries to the individuals, families and institutions we serve.

## Investment Management

Great Point creates investment portfolios designed to capture returns from global equity and credit markets.  The portfolios maintain a long-term view on capital markets while rebalancing based on evolving economic environments.

## Wealth Advisory

Great Point provides its Wealth Advisory clients with effective tax management, estate planning, insurance and risk management consulting, cash flow management, executive compensation planning and a referral network to complementary professionals.

## Family Office Services

As a fiduciary investment advisor, Great Point provides trusteeship, private equity placement, tax administration, payment services, intergenerational consulting and private charitable foundation management.


## Quarterly Market Review

The Quarterly Market Review features global capital market performance and a timeline of events for the past three months. It includes returns from various asset classes across US and international markets. The report also illustrates the impact of globally diversified portfolios and a quarterly topic.

Download Q1 Report

## Access your account below

TD AMERITRADE Institutional

Fidelity INVESTMENTS

TIAA

my529 UTAH EDUCATIONAL SAVINGS PLAN

## Frequently Asked Questions

Who are clients of Great Point Wealth Advisors? +

What does Great Point advise on?

Does Great Point coordinate with, or make introductions to, other professionals?

What does Great Point Wealth Advisors invest in?

Where are your clients' accounts held?

What is involved with transferring accounts?

How often is my account reviewed?

How often does Great Point meet with its clients?

How does the initial consultation work?

Are references available?

## Notable

### Why You Should Diversify

When international stock returns lag, investors may feel tempted to double down on their home market. Historical data suggests the long-term benefits of diversifying globally. Why Should

## Total Cost of Ownership

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Costs m… …er you're buying a car or selecting an investment strategy, the costs you expect to pay are likely to be an important factor in making…

## An Enduring Philosophy

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Combining an enduring investm… …y with a simple formula that helps maintain investment discipline can increase the odds of having a positive financial experience. Investing is a long-term endeavor. Indeed, people will spend decades pursuing their financial goals. But being…

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