



From "what's coming up" to "what do we do now?",
Waypoint Wealth Partners is your trusted advisor to
navigate some of life's most important wealth management
decisions.



ESTABLISH CLARITY

It's a confusing world out there. Good info, bad info, brilliant insights, hidden details. Together we'll clarify your goals, vision, values and what's really important to you so we can filter through the noise and help you make smart financial decisions.



CREATE ALIGNMENT

We live in a world of abundance with endless demands on our time and our money. We will pull together all of the pieces of your financial life and align them to your vision and values to put you on a path of your choosing; not just the path of least resistance.



ENSURE PROGRESS

Plans without actions are just dreams. And we understand that life often gets in the way of our best intentions. We are invested in your vision and will work with you to ensure that action gets taken and we're moving the needle so your vision becomes reality.

We are independently owned and
operated.

And yes, we are a fiduciary.

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