Partners LLC

Your Life.
Your Plans.
Your Assets.

Shorepoint Capital Partners LLC is a privately owned, fee-only registered investment advisor that provides customized wealth planning and investment management services to individuals and families, institutions, small businesses and retirement plans.

More About Us

You don’t manage your life, your business or your organization to conform to a generic model.

Why would you settle for a wealth manager that expects you to?

At Shorepoint Capital Partners, we don’t think you should.

We only answer to you.

No middlemen, no commissions, no corporate hierarchy. Remaining privately owned keeps our focus where it should be: providing objective financial advice and customized wealth management strategies for you.

As a registered investment advisor and financial advisory firm, we are committed to providing the following customized, fee-only services.

That’s why we offer an alternative to the one-size-fits-all approach to wealth planning and investment management.

You won’t find cookie-cutter solutions at Shorepoint.

What you will find is an independent firm where you have a personal relationship with experienced professionals who understand you, your goals and how to get you there.

Individuals and Families

Institutions

Small Businesses

Employee Benefit Plans

We know that selecting a wealth advisor and investment manager is an important decision, and we want to give you all the information you need to select the right firm for you, your business or your organization. We welcome your questions and look forward to getting to know more about how we can help you meet your objectives.

Contact us today to set up a consultation with Managing Directors Tim Vanech and Luis Raposo, CFA.

Latest News

Shorepoint Welcomes Howard Corey

2019 Five Star Professional

Shorepoint Launches First Private Fund

Congratulations to Ashley Lareau, CFP®

Shorepoint Welcomes John Barrett

Latest Commentary

Newsletter Q1 2019

Quarterly Market Review: January-March 2019

Newsletter Q4 2018

Quarterly Market Review: October-December 2018

Quarterly Market Review: July-September 2018

Market Review

Quarterly Market Review: January-March 2019

Quarterly Market Review: October-December 2018

Quarterly Market Review: July-September 2018

Quarterly Market Review: April-June 2018

Quarterly Market Review: January-March 2018

Newsletters

Newsletter Q1 2019

Newsletter Q4 2018

Newsletter Q3 2018

Newsletter Q2 2018

Newsletter Q1 2018

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