Financial Guidance

Through Life's Milestones






StrategicPoint

A FOCUS FINANCIAL PARTNER

StrategicPoint Advisory Team

Our Story Begins with You

StrategicPoint was founded with the goal of providing independent wealth management for individuals and families. We partner with clients like you to bring personalized solutions to complex financial issues. Our collaborative team approach combines years of extensive experience and broad financial expertise. We are passionate about providing the highest quality of service, and we work hard to maintain lasting relationships across all of life's milestones. **Our goal is and always has been to provide advice tailored to meet your needs while keeping your best interests top of mind.**

Throughout each stage of your life, you will be presented with a range of financial challenges, each unique and personal. Let us offer the professional guidance you and your family need to make informed choices along the way.

Financial Milestones

Starting Out

- Establishing a career
- Launching a business
- Purchasing a first home
- Opening a retirement account
- Creating a budget
- Evaluating insurance needs

Building Wealth

- Negotiating career changes
- Maximizing 401(k)/403(b) savings
- Saving for college
- Balancing assets and liabilities
- Executing tax strategies
- Establishing estate plans

Approaching Retirement

- Identifying retirement lifestyle goals
- Exploring pension and social security options
- Creating a long term care plan
- Generating business succession plans
- Monitoring retirement projections
- Adjusting portfolio risk

Living In Retirement

- Developing retirement income strategies
- Focusing on wealth preservation
- Funding charitable gifting goals
- Planning for intergenerational wealth transfer
- Managing real estate holdings
- Caring for aging parents

Guiding You

Through Life's Financial Milestones

Our Services

You've worked hard to build your savings. That's why our investment management process is the centerpiece for your financial goals.

Managing your money begins with our understanding your feelings about risk.

We then help you select a portfolio tailored to your investment objectives.

Because market and economic conditions fluctuate, our experienced team utilizes a proactive tactical asset allocation approach to investing. This means we focus on mitigating risk and enhancing rewards by making prudent adjustments to your portfolio as economic circumstances indicate.

Our holistic approach integrates your investments with financial planning techniques to help guide you towards financial independence.

Developing a Strong Financial Foundation

Examining each facet of your current financial situation is vital to developing your personal plan of action. We will facilitate the implementation of your plan, monitor it on an ongoing basis, and make any necessary adjustments to your strategy.

Evaluating Your Insurance Needs

Our careful evaluation of your insurance needs helps lay the groundwork for your financial stability. We will work with you to help ensure that you and your family are protected against life's unexpected challenges.

Passing on Your Wealth

Being able to share your wealth with others can be very rewarding. Whether preparing to pass on your wealth to loved ones or making gifts to your chosen charities, we will work with you to maximize those transfers while incorporating strategies that also benefit your estate.

Forecasting for Retirement

Feeling confident about when you can retire is an important goal. We discuss your aspirations, run the numbers and help you plan your best path to retirement. We then develop sensible and tax-efficient withdrawal strategies for supporting your retirement lifestyle.

Your Advisory Team

Your dedicated team of financial professionals will help keep you on track as you encounter important financial hurdles throughout your life.

Betsey A. Purinton, CFP®
Managing Partner
Chief Investment Officer and
Senior Financial Advisor
bpurinton@StrategicPoint.com

"I have always had a passion for education. I was a teacher and school administrator before moving into the wealth management field. I enjoy sharing my knowledge with clients and helping them become and stay financially independent."

Richard J. Anzelone, J.D.
Partner
Chief Compliance Officer and
Senior Financial Advisor
ranzelone@StrategicPoint.com

"I approach my relationship with my clients not only as their advisor, but also as their strategic partner. Helping them manage their investments and finances allows them to spend more time focusing on what matters most to them in their lives."

Derek M. Amey
Partner
Portfolio Manager and
Senior Financial Advisor
damey@StrategicPoint.com

"Many people have financial challenges they don't fully understand. I enjoy identifying and addressing potential pitfalls with my clients. Offering solutions is my greatest reward."

Sean M. Giles
Senior Financial Advisor
sgiles@StrategicPoint.com

"I believe that maintaining long term relationships is essential to being a valued financial advisor. Working with my clients to develop a game plan and then helping them turn their goals into reality is what keeps the advising relationship strong."

Kristina M. Mello, MBA
Financial Planner
kmello@StrategicPoint.com

"Realizing the tremendous value that financial planning provides, I'm passionate about helping clients navigate important questions and concerns in various stages of their lives."

Tara L. Budlong
Client Service Specialist
tbudlong@StrategicPoint.com

"It's refreshing to work for a firm that takes client service so seriously. I love being able to work with our clients on an ongoing basis and handle their everyday needs."

Aaron C. Reynolds, CFA®
Associate Portfolio Manager
areynolds@StrategicPoint.com

"I enjoy the challenge of researching and analyzing economic indicators for the Portfolio Management committee. I take pride in my role of supporting the team to help make educated decisions on prudent investments."

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Our Responsibility to You

StrategicPoint embraces its fiduciary duty to act in your best interest. At every step of the wealth management process we develop strategies and clearly articulate recommendations on what is most advantageous to you.

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