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Part 2B of Form ADV: *Brochure Supplement*

Richard J. Anzelone, J.D.
Partner and Chief Compliance Officer



StrategicPoint

A FOCUS FINANCIAL PARTNER

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www.StrategicPoint.com

November 8, 2019

This Brochure Supplement provides information about Richard Anzelone that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401- 273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Richard J. Anzelone is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 5/2/1964
- Bryant University, Bachelor of Science in Finance, 1986
- Creighton University School of Law, Juris Doctorate, 1993

Business Experience:

Richard J. Anzelone, J.D., Partner and Chief Compliance Officer, also serves as Senior Financial Advisor, providing investment advice and wealth management to clients. He holds a BS in Finance from Bryant University and a Juris Doctorate degree from Creighton University School of Law. Rick is a member of the Rhode Island Bar Association, holds the FINRA Series 66 license and RI, MA, FL and NC Life and Health Insurance Producers Licenses.

Rick started his career at Pratt and Whitney Aircraft Corporation in finance and later worked for Textron Financial Corporation in leveraged commercial equipment leasing. In 1993 he graduated from Creighton University law school and practiced law in Nebraska and Rhode Island in the areas of estate planning, business law and bankruptcy law prior to joining StrategicPoint in December of 1999.

He began his career at StrategicPoint as a Financial Advisor and during this time he co-hosted the *Making Money* radio show on WHJJ 920-AM. He is also a member of the Portfolio Management Committee, which directs the firm's investment strategies.

Rick is a member of the Diocesan Accounting and Audit Committee, as well as the St. Pius School board. He has also served on the board of Amos House, which is a nonprofit social services agency that provides hospitality and direct services to the homeless and poor of Rhode Island. He lives with his wife, Jennifer, in Providence with their two children.

Item 3- Disciplinary Information

There are no legal or disciplinary events for Richard J. Anzelone

Item 4- Other Business Activities

Richard Anzelone is also a licensed insurance professional, and as such, is also in the business of offering insurance products. The sale of insurance products will generate standard and customary insurance commissions which are paid to StrategicPoint Insurance Services ("SPIS"), an affiliate of SPIA. Such compensation gives Richard Anzelone an incentive to recommend certain insurance products based on the compensation received by SPIS rather than on your needs. However, he does not consider the commissions paid to SPIS but rather adheres to an investment discipline considering your overall financial situation. You are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with SPIA.

Item 5-Additional Compensation

Richard Anzelone does not receive any additional compensation, nor does he receive a bonus that is based on the number or amount of new accounts, sales or client referrals.

Richard Anzelone may receive directly or indirectly other compensation from Focus Financial Partners, LLC, the parent company of StrategicPoint Investment Advisors, LLC based on the profits of StrategicPoint Investment Advisors. This compensation is derived from the overall revenue of the firm, which consists of asset under management fees, financial planning fees and commissions from insurance products.

Item 6- Supervision

Investment decisions for all SPIA clients are made by members of the Portfolio Management Committee. SPIA's Portfolio Management Committee is led by Betsey A. Purinton, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, Partner and CCO, Derek M. Amey, Partner and Portfolio Manager, and Aaron Reynolds, Associate Portfolio Manager. The Portfolio Management Committee generally meets weekly to discuss existing and prospective investments. Investments are evaluated independently as well as in the context of clients' existing holdings and sector exposures.

Richard Anzelone is supervised by Betsey A. Purinton, Managing Partner and CIO. Ms. Purinton can be reached at (401) 273-1500 or bpurinton@strategicpoint.com.

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Betsey A. Purinton, CFP®
Managing Partner and Chief Investment Officer



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This Brochure Supplement provides information about Betsey Purinton that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401- 273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Betsey Purinton is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 1/24/1950
- University of Colorado, BA in Economics, 1972
- University of Colorado, MA in Economics, 1975
- Bryant University, Certificate in Financial Planning, 2001

Professional Certification:

CERTIFIED FINANCIAL PLANNER™ practitioner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification

Business Experience:

Betsey A. Purinton, CFP®, Managing Partner and Chief Investment Officer, holds a BA and MA in Economics from the University of Colorado, where she was elected to Phi Beta Kappa. She has a Certificate in Financial Planning from Bryant University and is a CERTIFIED FINANCIAL PLANNER™ practitioner. Betsey holds the FINRA Series 65 License and RI, MA, NC, FL, NH and ME Life and Health Insurance Producers Licenses. She has been with the firm since 2001.

In addition to her administrative responsibilities, Betsey serves as Senior Financial Advisor, providing investment advice and wealth management to clients. She specializes in women's planning issues and retirement decision making. As Chief Investment Officer, Betsey oversees the company's Portfolio Management Committee, which directs the firm's investment strategies. Betsey has also served as Director of Financial Planning for the company.

Betsey had appeared as a guest on WJAR/NBC10 with Frank Coletta. For 5 years, she co-hosted the *Making Money* radio show on WHJJ 920-AM and AM790 WPRV. She was a contributing columnist from 2009 until 2014 for East Side Monthly. She has been named a 2015 Business Women Achievement Honoree by Providence Business News.

Betsey currently serves on the Board of Directors of the United Way of Rhode Island, a non-profit organization dedicated to changing lives and strengthening the community through lifelong learning, basic supports and community engagement. Betsey is also an active member of United Way's Women United. Betsey has served as President, Chairman and Membership Director of the Financial Planning Association of Rhode Island. She is currently a member of the Estate Planning Council of Rhode Island.

Prior to her career in the financial services industry, Betsey was a teacher and school administrator in Colorado and New York. She lives with her husband, James English, in Providence. Their three children currently reside in Philadelphia, Salt Lake City and Ames, Iowa.

Item 3- Disciplinary Information

There are no legal or disciplinary events for Betsey Purinton.

Item 4- Other Business Activities

Betsey Purinton is also a licensed insurance professional, and as such, is also in the business of offering insurance products. The sale of insurance products will generate standard and customary insurance commissions which are paid to StrategicPoint Insurance Services ("SPIS"), an affiliate of SPIA. Such compensation gives Betsey Purinton an incentive to recommend certain insurance products based on the compensation received by SPIS rather than on your needs. However, she does not consider the commissions paid to SPIS but rather adheres to an investment discipline considering your overall financial situation. You are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with SPIA.

Item 5-Additional Compensation

Betsey Purinton receives compensation from Focus Financial Partners, LLC, the parent company of StrategicPoint Investment Advisors, LLC for her management responsibilities and her role as Senior Financial Advisor with regards to StrategicPoint Investment Advisors. The compensation represents a portion of revenue to StrategicPoint Investment Advisors which is derived from asset under management fees, financial planning fees and commissions from insurance products.

Betsey Purinton may receive directly or indirectly other compensation from Focus Financial Partners, LLC, the parent company of StrategicPoint Investment Advisors, LLC based on the profits of StrategicPoint Investment Advisors. This compensation is derived from the overall revenue of the firm, which consists of asset under management fees, financial planning fees and commissions from insurance products.

Item 6- Supervision

Investment decisions for all SPIA clients are made by members of the Portfolio Management Committee. SPIA's Portfolio Management Committee is led by Betsey Purinton, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, Partner and CCO, Derek Amey, Partner and Portfolio Manager, and Aaron Reynolds, Associate Portfolio Manager. The Portfolio Management Committee generally meets weekly to discuss existing and prospective investments. Investments are evaluated independently as well as in the context of clients' existing holdings and sector exposures.

Betsey Purinton is supervised by Richard J. Anzelone, Partner and CCO in certain capacities. Richard Anzelone periodically reviews aspects of Betsey's work with respect to complying with securities laws, rules and regulations. Richard Anzelone can be reached at (401) 273-1500 or ranzelone@strategicpoint.com.

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Derek M. Amey
Partner and Portfolio Manager



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November 8, 2019

This Brochure Supplement provides information about Derek Amey that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401- 273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Derek M. Amey is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 9/30/1975
- The University of Rhode Island, BS in Business Administration, 1997

Business Experience:

Derek Amey, Partner, serves as Portfolio Manager as well as Financial Advisor to clients of StrategicPoint, providing investment advice and wealth management to clients. He is a member of StrategicPoint's Portfolio Management Committee, which directs the firm's investment strategies. He has been with the firm since 2001 and holds the FINRA Series 66 license.

Derek is a graduate of The University of Rhode Island with a Bachelor of Science Degree in Business Administration. His background includes experience as a Trading Desk Supervisor at Suretrade, Inc. and an Online Product Support Specialist at Quick & Reilly, Inc.

Derek has appeared as a regular guest on WJAR/NBC10 with Frank Coletta. He also appeared on StrategicPoint's *Making Money* radio show on WHJJ 920-AM and AM790 WPRV. Derek is a former board member of the Katie DeCubellis Memorial Foundation. He lives with his wife and two sons in North Kingstown.

Item 3-Disciplinary Information

There are no legal or disciplinary events for Derek Amey

Item 4-Other Business Activities

There are no other business activities for Derek Amey.

Item 5-Additional Compensation

Derek Amey does not receive any additional compensation, nor does he receive a bonus that is based on the number or amount of new accounts, sales or client referrals.

Derek Amey may receive directly or indirectly other compensation from Focus Financial Partners, LLC, the parent company of StrategicPoint Investment Advisors, LLC based on the profits of StrategicPoint Investment Advisors. This compensation is derived from the overall revenue of the firm, which consists of asset under management fees, financial planning fees and commissions from insurance products.

Item 6- Supervision

Investment decisions for all SPIA clients are made by members of the Portfolio Management Committee. SPIA's Portfolio Management Committee is led by Betsey A. Purinton, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, Partner and CCO, Derek M. Amey, Partner and Portfolio Manager, and Aaron C. Reynolds, Associate Portfolio Manager. The Portfolio Management Committee generally meets weekly to

discuss existing and prospective investments. Investments are evaluated independently as well as in the context of clients' existing holdings and sector exposures.

Derek Amey is supervised by Managing Partner Betsey A. Purinton. She can be reached at (401) 273-1500 or bpurinton@strategicpoint.com.

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Sean M. Giles
Senior Financial Advisor



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August 21, 2019

This Brochure Supplement provides information about Sean Giles that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401-273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Sean M. Giles is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 3/31/1969
- Secondary Education: None

Business Experience:

Sean Giles serves as a Senior Financial Advisor, providing financial planning and investment advice to new and existing clients. Sean is also responsible for building client relationships and facilitating client service needs. He has been with the firm for a total of 19 years.

Sean began his career with StrategicPoint as a client service associate, and has also held positions as Client Service Manager, Senior Relationship Manager and Director of Sales. Sean holds the FINRA Series 65 License, as well as RI, MA, FL, NH, CO and VA Life and Health Insurance Producers Licenses.

Sean appeared on StrategicPoint's *Making Money* radio show on AM790 WPRV. He lives with his family in the East Bay.

Item 3-Disciplinary Information

There are no legal or disciplinary events for Sean Giles

Item 4- Other Business Activities

Sean Giles is also a licensed insurance professional, and as such, is also in the business of offering insurance products. The sale of insurance products will generate standard and customary insurance commissions which are paid to StrategicPoint Insurance Services ("SPIS"), an affiliate of SPIA. For the sale of some insurance products, Sean Giles will be paid up to 70% of the commissions received by SPIS. Such compensation gives Sean Giles an incentive to recommend certain insurance products based on the compensation received by SPIS rather than on your needs. However, he does not consider the commissions paid to SPIS, nor himself, but rather adheres to an investment discipline considering your overall financial situation. You are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with SPIA.

Item 5-Additional Compensation

Sean Giles receives compensation for generating new clients. The compensation is based on a percentage of the investment management fee paid by the client.

As mentioned above in Item 4, for the sale of some insurance products, Sean Giles will be paid up to 70% of the commissions received by SPIS.

Item- 6- Supervision

Investment decisions for all SPIA clients are made by members of the Portfolio Management Committee. SPIA's Portfolio Management Committee is led by Betsey A. Purinton, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, Partner and CCO, Derek M. Amey, Partner and Portfolio Manager, and Aaron C. Reynolds, Associate Portfolio Manager. The Portfolio Management Committee generally meets weekly to discuss existing and prospective investments. Investments are evaluated independently as well as in the context of clients' existing holdings and sector exposures.

Sean Giles is supervised by Partner Richard Anzelone and Managing Partner Betsey Purinton. They can be reached at (401) 273-1500 or ranzelone@strategicpoint.com and bpurinton@strategicpoint.com, respectively.

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Tara L. Budlong
Client Service Manager and Advisor



StrategicPoint

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April 21, 2020

This Brochure Supplement provides information about Tara Budlong that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401-273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Tara Budlong is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 1/16/1978
- Secondary Education: None

Business Experience:

Tara Budlong serves as Client Service Manager and Advisor, providing support to StrategicPoint's Advisory team. She is responsible for assisting clients and facilitating their service needs. She has been with StrategicPoint since 2011.

Tara has over 20 years of experience as a client service representative, including experience at Putnam Investments as well as Columbia Management. She holds the FINRA Series 65 license, as well as RI, CT and MA Life and Health Insurance Producers Licenses.

Item 3-Disciplinary Information

There are no legal or disciplinary events for Tara Budlong.

Item 4- Other Business Activities

Tara Budlong is a licensed insurance professional, and as such, is also in the business of offering insurance products. The sale of insurance products will generate standard and customary insurance commissions which are paid to StrategicPoint Insurance Services ("SPIS"), an affiliate of SPIA. For the sale of some insurance products, Tara Budlong will be paid up to 70% of the commissions received by SPIS. Such compensation gives Tara Budlong an incentive to recommend certain insurance products based on the compensation received by SPIS and herself rather than on your needs. However, she does not consider the commissions paid to SPIS, nor herself, but rather adheres to an investment discipline considering your overall financial situation. You are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with SPIA.

Item 5-Additional Compensation

Tara Budlong receives compensation for generating new clients. The compensation is based on a percentage of the investment management fee paid by the client.

As mentioned above in Item 4, for the sale of some insurance products, Tara Budlong will be paid up to 70% of the commissions received by SPIS.

Item- 6- Supervision

Investment decisions for all SPIA clients are made by members of the Portfolio Management Committee. SPIA's Portfolio Management Committee is led by Betsey A. Purinton, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, Partner and CCO, Derek M. Amey, Partner and Portfolio Manager, and Aaron C. Reynolds, Asset

Allocation Specialist. The Portfolio Management Committee generally meets weekly to discuss existing and prospective investments. Investments are evaluated independently as well as in the context of clients' existing holdings and sector exposures.

Tara Budlong is supervised by Partners Richard J. Anzelone, Derek M. Amey and Managing Partner Betsey A. Purinton. They can be reached at (401) 273-1500 or ranzelone@strategicpoint.com and bpurinton@strategicpoint.com, respectively.

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Aaron C. Reynolds, CFA®
Associate Portfolio Manager



StrategicPoint

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August 21, 2019

This Brochure Supplement provides information about Aaron Reynolds that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401-273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Aaron Reynolds is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 11/11/1985
- Secondary Education: University of Rhode Island, Bachelor of Arts in History, Political Science, minor in Classical Civilization
- CFA Institute, Chartered Financial Analyst® (CFA®) Designation: 2017

Professional Certification: Chartered Financial Analyst® (CFA®) Designation. The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute- the largest global association of investment professionals. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment. Additionally, regulatory bodies in over 30 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning. The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession

Business Experience:

Aaron Reynolds, CFA®, serves as Associate Portfolio Manager. He began his career at StrategicPoint in 2011, and is a member of StrategicPoint's Portfolio Management Committee, which directs the firm's investment strategies.

In his current role, Aaron helps perform due diligence on investments, as well as research recommendations for new asset classes to add to our firm's investment portfolios. Aaron implements various trading strategies instituted by our portfolio management committee and rebalances client portfolios using proprietary and third-party portfolio software.

Aaron is a graduate of The University of Rhode Island with a Bachelor of Arts in History, Political Science and a minor in Classical Civilization. He holds the Chartered Financial Analyst® designation, as well as the FINRA Series 65 license. His background includes experience as a brokerage client service specialist at Citizens Bank. Aaron lives in Warwick, RI with his wife and two children.

Item 3-Disciplinary Information

There are no legal or disciplinary events for Aaron Reynolds.

Item 4- Other Business Activities

There are no other business activities for Aaron Reynolds.

Item 5-Additional Compensation

There is no additional compensation for Aaron Reynolds.

Item- 6- Supervision

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Aaron Reynolds is supervised by Partners Richard J. Anzelone, Derek Amey and Managing Partner Betsey A. Purinton. They can be reached at (401) 273-1500 or ranzelone@strategicpoint.com and bpurinton@strategicpoint.com, respectively.

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Part 2B of Form ADV: *Brochure Supplement*

Kristina M. Mello, MBA
Financial Planner and Advisor



StrategicPoint

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April 21, 2020

This Brochure Supplement provides information about Kristina Mello that supplements the Brochure of StrategicPoint Investment Advisors, LLC ("SPIA"). You should have received a copy of that Brochure. Please contact Richard Anzelone, Partner and Chief Compliance Officer (401-273-1500 X 102 or ranzelone@strategicpoint.com) if you did not receive StrategicPoint Investment Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Kristina Mello is available on the SEC's website at www.adviserinfo.sec.gov.

Item- 2- Educational Background and Business Experience

Educational Background:

- Date of Birth: 10/5/1985
- Global MBA: Concentration in International Finance, Suffolk University, May 2016
- Secondary Education: Emmanuel College, Double Bachelor of Arts in Global Studies & Spanish, 2007

Professional Certification: Master of Business Administration (MBA)

The Master of Business Administration (MBA) is a graduate degree designed to help people run businesses. The MBA program core courses focus on areas of business such as accounting, finance, marketing, human resources and operations management.

Business Experience:

Kristina Mello serves as Financial Planner and Advisor for StrategicPoint Investment Advisors, working closely with our team to help deliver tailored strategies to our clients' ever-changing needs.

Kristina brings with her more than ten years of financial services experience. Prior to joining StrategicPoint, she held various roles at J.P. Morgan, Bank of America and Merrill Lynch, including a background in client service and operations, credit and lending, and practice management.

Kristina graduated from Emmanuel College in 2007 with a double B.A. in Spanish & Global Studies and obtained her Global MBA from Suffolk University in 2016. She holds the FINRA Series 66 license as well as RI and MA Life and Health Insurance Producers Licenses. She has had the opportunity to travel around the world, for both personal & academic growth. In her spare time, she enjoys traveling, dancing, and spending time with family & friends.

Item 3-Disciplinary Information

There are no legal or disciplinary events for Kristina Mello.

Item 4- Other Business Activities

Kristina Mellow is a licensed insurance professional, and as such, is also in the business of offering insurance products. The sale of insurance products will generate standard and customary insurance commissions which are paid to StrategicPoint Insurance Services ("SPIS"), an affiliate of SPIA. For the sale of some insurance products, Kristina Mello will be paid up to 70% of the commissions received by SPIS. Such compensation gives Kristina Mello an incentive to recommend certain insurance products based on the compensation received by SPIS and herself rather than on your needs. However, she does not consider the commissions paid to SPIS, nor herself, but rather adheres to an investment discipline considering your overall financial situation. You are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with SPIA.

There are no other business activities for Kristina Mello.

Item 5-Additional Compensation

As mentioned above in Item 4, for the sale of some insurance products, Kristina Mello will be paid up to 70% of the commissions received by SPIS.

Item- 6- Supervision

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Kristina Mello is supervised by Partners Richard J. Anzelone, Derek Amey and Managing Partner Betsey A. Purinton. They can be reached at (401) 273-1500 or ranzelone@strategicpoint.com, damey@strategicpoint.com and bpurinton@strategicpoint.com respectively.