

Item 1- Cover Page

Part 2B of Form ADV: *Brochure Supplement*

Richard J. Anzelone, J.D., CRPC™
Managing Partner and Chief Compliance Officer



StrategicPoint
INVESTMENT ADVISORS

294 West Exchange Street
Providence, RI 02903
(401) 273-1500/Telephone
(800) 597-5974/Toll-Free
(401) 273-8987/Fax

www.StrategicPoint.com

March 23, 2026

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, Managing 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
- The College for Financial Planning, Chartered Retirement Planning Counselor or CRPC™ designation

Professional Certification: Chartered Retirement Planning Counselor or CRPC™

Richard J. Anzelone is a Chartered Retirement Planning Counselor or CRPC™ professional. The College for Financial Planning awards the Chartered Retirement Planning Counselor or CRPC™ designation to individuals who successfully complete a course of study encompassing pre- and post-retirement needs, asset management, estate planning, and the entire retirement planning process using models and techniques from real client situations. Individuals are required to pass an online and timed end-of-course examination with a 70% score or higher. The examination tests the individual's ability to relate complex concepts and apply theoretical concepts to real-life situations. Authorization for continued use of the credential must be renewed every two years by completing 16 hours of continuing education and reaffirming compliance with the College of Financial Planning's standards of professional conduct and terms and conditions, among other things.

Business Experience:

Richard J. Anzelone, J.D., CRPC™, Managing 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 and NC Life and Health Insurance Producers Licenses.

Rick is a member of StrategicPoint's Portfolio Management Committee, which directs the firm's investment strategies. He 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.

Rick is a member of the Diocesan Accounting and Audit Advisory Committee. 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 Focus Risk Solutions (“FRS”), an affiliate of SPIA. The receipt of compensation for the sale of insurance products presents a conflict of interest because the compensation provides an incentive to recommend insurance for the purpose of being compensated rather than solely based on your needs. As a fiduciary, Richard Anzelone has a duty to make recommendations he reasonably believes are in your best interest. He mitigates the conflict of interest related to his recommendation through disclosure and believes his recommendation is appropriate when the conflict of interest is disclosed. However, he does not consider the commissions paid to FRS 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 is eligible for additional compensation from our indirect parent company, Focus Financial Partners, LLC (or one of its affiliates), depending on our annual revenues and/or earnings. This potential for increased compensation provides an incentive for Richard to encourage you to maintain and even increase the size of your investment account with us.

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 Derek M. Amey, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, JD, CRPC™, Managing Partner and CCO, Aaron C. Reynolds, CFA, Associate Portfolio Manager, Kristina M. Mello, Senior Financial Advisor and Director of Financial Planning, and Sean M. Giles, Senior Financial Advisor. 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 Derek Amey, Managing Partner and CIO. Mr. Amey can be reached at (401) 273-1500 or damey@strategicpoint.com.

Item 1- Cover Page

Part 2B of Form ADV: *Brochure Supplement*

Derek M. Amey
Managing Partner and Chief Investment Officer



StrategicPoint
INVESTMENT ADVISORS

294 West Exchange Street
Providence, RI 02903
(401) 273-1500/Telephone
(800) 597-5974/Toll-Free
(401) 273-8987/Fax

www.StrategicPoint.com

March 23, 2026

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, Managing 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, Managing Partner, serves as Chief Investment Officer as well as Senior Financial Advisor at StrategicPoint, providing investment advice and wealth management to clients. As Chief Investment Officer, Derek oversees the company's Portfolio Management Committee, which directs the firm's investment strategies.

Derek is a graduate of The University of Rhode Island with a Bachelor of Science Degree in Business Administration. He holds the FINRA Series 66 license. His background includes experience as a Trading Desk Supervisor at Suretrade, Inc. and an Online Product Support Specialist at Quick & Reilly, Inc. He has been with StrategicPoint since 2001.

Derek is the co-host of StrategicPoint's podcast, *The Novice and The Nerd*. To learn more about Derek, his career path and his approach to advising clients, watch his interview on "Eye Openers" with Brittany Drozd on StrategicPoint.com. He has appeared as a guest on "State of the State", a public access television show produced in Rhode Island.

He lives with his wife and two sons in North Kingstown, RI.

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 is eligible for additional compensation from our indirect parent company, Focus Financial Partners, LLC (or one of its affiliates), depending on our annual reviews and/or earnings. This potential for increased compensation provides an incentive for Derek to encourage you to maintain and even increase the size of your investment account with us.

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 Derek M. Amey, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, JD, CRPC™, Managing Partner and CCO, Aaron C. Reynolds, CFA, Associate Portfolio Manager, Kristina M. Mello, Senior Financial Advisor and Director of Financial Planning, and Sean M. Giles, Senior Financial Advisor. 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 and CCO Richard Anzelone. He can be reached at (401) 273-1500 or ranzelone@strategicpoint.com.

Item 1- Cover Page

Part 2B of Form ADV: *Brochure Supplement*

Sean M. Giles
Senior Financial Advisor



StrategicPoint
INVESTMENT ADVISORS

294 West Exchange Street
Providence, RI 02903
(401) 273-1500/Telephone
(800) 597-5974/Toll-Free
(401) 273-8987/Fax

www.StrategicPoint.com

March 23, 2026

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 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.

Sean has been with StrategicPoint in various roles over the last 30 years, with the last 25 as a Financial Advisor. He has previously 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 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 Focus Risk Solutions ("FRS"), an affiliate of SPIA. For the sale of some insurance products, Sean Giles will be paid up to 70% of the commissions received by FRS. The receipt of compensation for the sale of insurance products presents a conflict of interest because the compensation provides an incentive to recommend insurance for the purpose of being compensated rather than solely based on your needs. As a fiduciary, Sean Giles has a duty to make recommendations he reasonably believes are in your best interest. He mitigates the conflict of interest related to his recommendation through disclosure and believes his recommendations are appropriate when the conflict of interest is disclosed. However, he does not consider the commissions paid to FRS, 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 FRS.

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 Derek M. Amey, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, JD, CRPC™, Managing Partner and CCO, Aaron C. Reynolds, CFA, Associate Portfolio Manager, Kristina M. Mello, Senior Financial Advisor and Director of Financial Planning, and Sean M. Giles, Senior Financial Advisor. 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 Managing Partners Richard Anzelone and Derek Amey. They can be reached at (401) 273-1500 or ranzelone@strategicpoint.com and damey@strategicpoint.com, respectively.

Item 1- Cover Page

Part 2B of Form ADV: *Brochure Supplement*

Tara L. Budlong
Client Service Manager and Advisor



StrategicPoint
INVESTMENT ADVISORS

294 West Exchange Street
Providence, RI 02903
(401) 273-1500/Telephone
(800) 597-5974/Toll-Free
(401) 273-8987/Fax

www.StrategicPoint.com

March 23, 2026

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 L. 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, including managing and advising her own clients. She has been with StrategicPoint since 2011.

Tara has over 25 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, MA, CT, ME and FL 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 Focus Risk Solutions ("FRS"), an affiliate of SPIA. For the sale of some insurance products, Tara Budlong will be paid up to 70% of the commissions received by FRS. The receipt of compensation for the sale of insurance products presents a conflict of interest because the compensation provides an incentive to recommend insurance for the purpose of being compensated rather than solely based on your needs. As a fiduciary, Tara Budlong has a duty to make recommendations she reasonably believes are in your best interest. She mitigates the conflict of interest related to her recommendation through disclosure and believes her recommendations are appropriate when the conflict of interest is disclosed. However, she does not consider the commissions paid to FRS, 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 FRS.

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 Derek M. Amey, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, JD, CRPC™, Managing Partner and CCO, Aaron C. Reynolds, CFA, Associate Portfolio Manager, Kristina M. Mello, Senior Financial Advisor and Director of Financial Planning, and Sean M. Giles, Senior Financial Advisor. 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 Managing Partners Richard Anzelone and Derek Amey. They can be reached at (401) 273-1500 or ranzelone@strategicpoint.com and damey@strategicpoint.com, respectively.

Item 1- Cover Page

Part 2B of Form ADV: *Brochure Supplement*

Aaron C. Reynolds, CFA®
Associate Portfolio Manager



StrategicPoint

INVESTMENT ADVISORS

294 West Exchange Street
Providence, RI 02903
(401) 273-1500/Telephone
(800) 597-5974/Toll-Free
(401) 273-8987/Fax

www.StrategicPoint.com

March 23, 2026

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 C. 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 with his family in Warwick, RI.

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

Investment decisions for all SPIA clients are made by members of the Portfolio Management Committee. SPIA's Portfolio Management Committee is led by Derek M. Amey, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, JD, CRPC™, Managing Partner and CCO, Aaron C. Reynolds, CFA, Associate Portfolio Manager, Kristina M. Mello, Senior Financial Advisor and Director of Financial Planning, and Sean M. Giles, Senior Financial Advisor. 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.

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

Item 1- Cover Page

Part 2B of Form ADV: *Brochure Supplement*

Kristina M. Mello, MBA
Senior Financial Advisor and Director of Financial Planning



StrategicPoint
INVESTMENT ADVISORS

294 West Exchange Street
Providence, RI 02903
(401) 273-1500/Telephone
(800) 597-5974/Toll-Free
(401) 273-8987/Fax

www.StrategicPoint.com

March 23, 2026

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, Managing 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 M. 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, Senior Financial Advisor, also serves as Director of Financial Planning for StrategicPoint Investment Advisors, working closely with our team to help deliver tailored strategies to our clients' ever-changing needs. Kristina specializes in women's planning issues and retirement decision making, and is a member of StrategicPoint's Portfolio Management Committee, which directs the firm's investment strategies. She is responsible for building client relationships and delivering the highest standard of wealth management while facilitating client service needs.

Prior to joining StrategicPoint in 2018, Kristina held various roles at J.P. Morgan, Bank of America and Merrill Lynch, including 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, MA, FL and PA 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 Mello 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 Focus Risk Solutions ("FRS"), an affiliate of SPIA. For the sale of some insurance products, Kristina Mello will be paid up to 70% of the commissions received by FRS. The receipt of compensation for the sale of insurance products presents a conflict of interest because the compensation provides an incentive to recommend insurance for the purpose of being compensated rather than solely

based on your needs. As a fiduciary, Kristina Mello has a duty to make recommendations she reasonably believes are in your best interest. She mitigates the conflict of interest related to his recommendation through disclosure and believes her recommendations are appropriate when the conflict of interest is disclosed. However, she does not consider the commissions paid to FRS, 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

Kristina Mello 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, Kristina Mello will be paid up to 70% of the commissions received by FRS.

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 Derek M. Amey, Managing Partner and Chief Investment Officer and also includes Richard J. Anzelone, JD, CRPC™, Managing Partner and CCO, Aaron C. Reynolds, CFA, Associate Portfolio Manager, Kristina M. Mello, Senior Financial Advisor and Director of Financial Planning, and Sean M. Giles, Senior Financial Advisor. 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.

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