



# PINPOINT

WEALTH PARTNERS

Integrity



Success



Honesty

## Our Promise

We are a boutique insurance advisory firm, securing lasting and successful outcomes for individuals, families and businesses.

Our intergenerational team is the foundation for a national platform to create the best possible solutions for our clients' long range planning objectives. We continually invest in industry-leading service capabilities, giving our clients confidence their long-term planning will succeed.

The decisions we make as individuals and as a team always take into consideration three core values, allowing for more intentional results for those who we serve:

### Integrity

We earn the trust of our clients by acting ethically in their best interests.

### Success

We are successful only when our clients achieve their goals.

### Honesty

We keep our word.

Pinpoint Wealth Partners specializes in three core areas to protect, preserve and plan for the wealth of our clients:

- **Wealth Transfer Planning** - We work with our clients and professional advisors to improve efficiencies and proactively solve issues that may arise during the wealth transfer process.
- **Business Planning** - We assist business owners in achieving long-term continuity by minimizing taxes, retaining key talent and planning for succession.
- **Life Insurance Solutions** - We simplify the acquisition process in situations where life insurance fits into the personal wealth and business planning process.

## Our Lion Street Advantage

Pinpoint Wealth Partners is a Founding Owner in Lion Street, Inc., a network of over 200 elite financial firms which collaborate on sophisticated wealth planning solutions. Leveraging the experience and insights of other Owners permits us to offer our clients the highest caliber of planning.



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