

WAYPOINT WEALTH COUNSEL

Waypoint Wealth Counsel is a fee-only wealth management firm providing investment management and financial counseling. In an increasingly complex financial system, Waypoint formulates a clear, understandable course of action and communicates every important detail to their clients. The commitment to their clients and hands-on wealth counsel is practiced through three core values: transparency, objectivity, and integrity.

The three core values permeate every part of the client experience.

Transparency is the disclosure of information. “It is evident to our clients that we are different. We make sure our clients fully understand how we will help them reach their goals. We also clearly communicate how we charge for our services, so that there are no surprises” says Brad McGrew. Integrity is paramount in any relationship. “At Waypoint, we put our client’s needs first.” says Matthew Woods. “Objectivity is providing solutions that are unique and appropriate to our clients and their finances. We don’t sell any products, so we can be more objective about our recommendations to clients” says Woods.



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Waypoint also feels that the Human Side of Wealth Management is an aspect of their approach that makes them unique.

For example, a client had Waypoint analyze the financial impact of purchasing a second home. The purchase did not have a material

impact on their financial future but McGrew and Woods pointed out that the intangible value of having another place for the family to gather was significant.

“This purchase brought the family together, which is bigger than money,” McGrew said. The client has since called McGrew and Woods to thank them for their recommendation to move forward with the purchase and now the family is looking forward to spending holidays together for many years to come.



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