CFP® Certification

Richard Nelson, First Point Comprehensive Wealth Planning

Our main goal at First Point Wealth Management is to put our clients' interests first. We are continually looking for strategies that will enhance the level of service. Over the past year, I have had the opportunity to earn my CFP® certification. The CFP® mark distinguishes advisors among peers in the financial services industry as it shows that they have voluntarily met rigorous requirements of education, examination and experience and abide by CFP Board's Standards of Professional Conduct, which includes agreeing to a fiduciary standard of care.

What does this CFP® certification mean to you?

It is a reinforcement that you are in the right place. We have always operated under a high expectation of ethics, with a focus on the client's needs. The CFP® certification is a meaningful professional credential that continues to evolve and be strengthened by new education, ethics and examination requirements.

Meeting your Financial Goals at Every Life Stage

As we work with clients to develop their financial road maps, we have found a vast number of reasons clients choose to work with us. Each story is unique and each financial need is unique. Below, you will find just a few situations in which our clients and their loved ones have benefited from our services.

These are scenarios I hear all the time. I've been assisting clients for 15 years in bringing peace of mind to their financial lives. Whatever your stage in life, there are important financial decisions that must be made in reaching your goals - some short-term, some long-term. I would encourage you to take out your current financial plan, dust it off and decide if it is currently meeting your expectations. If you haven't developed a formal plan, there is no time like the present. We work with clients daily to customize plans with their risk tolerance and goals in mind and help take the uncertainty out of the planning process. Call us to learn more about developing a financial plan or reviewing your current portfolio.

DO ANY OF THESE STATEMENTS SOUND FAMILIAR?

- "I question whether my current advisor has my best interest at heart."
- "I think I need a second opinion on the make-up of my portfolio."
- "Retirement is quickly approaching and I want to make sure my financial plan is where it needs to be."
- "My financial advisor has changed three times in the past three years. I need more stability with my planning."
- "We just received an inheritance and we're not sure the best way to proceed."
- "We've been trying to consolidate and streamline our investment portfolio. We feel the need to simplify."
- "My advisor is out of state and it would be so much more convenient to work with someone local."
- "Managing my parents' financial affairs has become overwhelming and it would be helpful to have assistance."

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