Investment Management
- Individuals & Families
- Businesses
- Non-profits
- Government Entities

Business Planning & Consulting
- New Entity Formation
- Risk Management
- Succession Planning

Financial Planning
- Estate Planning
- Retirement Planning
- Risk Management
- Wealth Accumulation
- Tax Management

Investment Advisory Services provided by LifePoint Advisory Services, LLC

LIFEPOINT
ADVISORY SERVICES

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ADVISORY SERVICES

4940 Cascade Rd SE Suite 130
Grand Rapids MI 49546
P (616) 949-9599
F (616) 949-9622
www.lifept.net

Building Blocks to Financial Independence

Advisory-Based Asset Management

Who we are…

We are a team of highly motivated professionals dedicated to the design, implementation, and ongoing guidance of financial plans for executives, business owners, and professionals. We strive to serve all of our clients' financial needs. We have a strong commitment to our clients, our industry, and our communities.

We are committed to providing the comprehensive service that our clients deserve to navigate today's increasingly complicated financial world. Whether it is a creative plan to handle estate or business continuation concerns, an investment strategy based on today's market situation, a detailed plan to fund your children's college educations, or action steps to accomplish your retirement goals, we are committed to properly consulting with and educating our clients.

LIFEPOINT

ADVISORY SERVICES

What we offer...

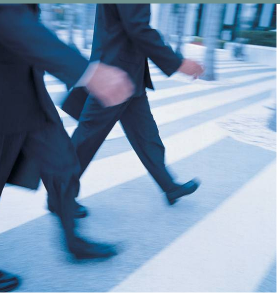
We offer a wide variety of financial products and services. However, the most important "product" we offer is service to our clients. And it is service — high-quality, responsive service — that helps us earn the trust and support of our clients.

We are committed…

We are committed to the simple tenet that the best interests of our clients must take precedence in all decisions. From data gathering, to analysis, to recommendations, our guiding principle is to make sure that the client has a clear picture of what is needed, why it is needed, and how their decisions will affect their financial future.

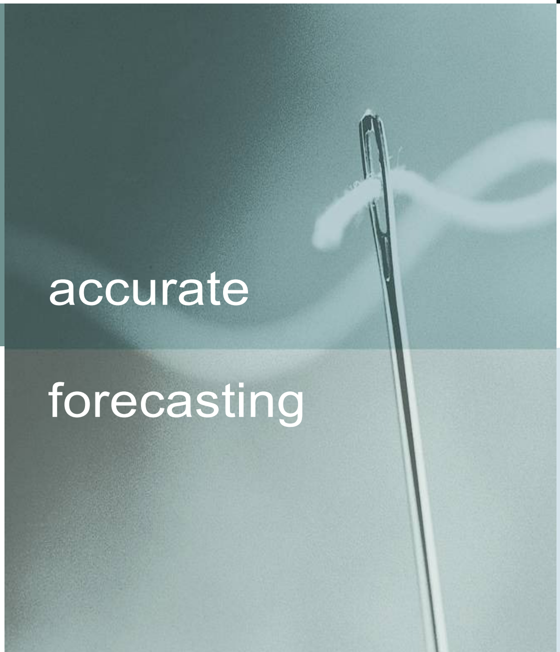
How we do Business…

In contrast to commission sales, our advisors work solely for you and are compensated only by a previously agreed upon fee based on assets under management. We are completely objective in our evaluations and provide you with a course of action to accommodate your individual needs. Our compensation is based on the management of your account, not the products that you purchase. We align our interests with your interests.



As a fiduciary…

We are responsible for the highest standard of care when it comes to managing your assets. We take this relationship very seriously and act at all times for the sole benefit and interests of our clients.



A proper financial plan...

A financial plan is more than just an occasional consideration to be thought about once every couple of years. It is an ongoing process of cooperation and coordination between financial advisor and client based on honesty, accessibility, and education.

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