| | Response |
|---|---|
| **Name of Firm** | Waypoint Financial Planning LLC |
| **Contact info:** | R. Alan Dossett 508-488-6577 alandossett@waypointfinancialplanning.com |
| **Website URL and/or NAPFA profile URL** | http://waypointfinancialplanning.com |
| **How many employees?** | solo + virtual assistant |
| **Do you have account minimums?** | no minimums for financial planning topics, $3000 annual minimum for investment management |
| **If you charge hourly fees, what is your standard rate?** | $300, but I rarely charge hourly |
| **If you charge AUM, how do you calculate fees?** | 0 to $500K: 0.85%<br>to $2M: 0.75%<br>to $3M: 0.7%<br>above 0.5% |
| **What is the range of AUM percentage fees?** | 0.85% down to 0.5%, $3K annual minimum |
| **What software do you use to prepare financial plans?** | MoneyGuide Pro |
| **Where do you meet clients? Your office, their home, Web meeting?** | primarily office in Westboro, some in their home or office or Skype/Facetime |
| **Do you accept clients outside Massachusetts?** | yes |
| **How long have you been a CFP® professional?** | 4 years, 2nd career |
| **Do you specialize? (divorce, retirement, seniors LGBTQ, etc** | retirement, investment mgmt |
| **Do you have any disciplinary history? Where can clients see it?** | none |

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| **Where is your office located?** | Westboro |
| **What is the name of your Registered Investment Advisor?** | Waypoint Financial Planning LLC |
| **What is the name of your Broker-Dealer, if applicable?** | |
| **Would you offer a free introductory call (for clients who have questions)?** | yes, in-person or by phone, based on client preference |