



For Immediate Release

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WealthPoint Announces Strategic Partnership with Clary Executive Benefits

PHOENIX, December 20, 2013 – WealthPoint, a leading provider of succession, exit and wealth transfer planning to entrepreneurial family groups and affluent clients throughout the U.S., announced today they have formed a Strategic Partnership with Clary Executive Benefits to assist with the firm’s existing succession and exit planning clients. WealthPoint will also be offering this enhanced capability to its professional advisor network. “This will uniquely position WealthPoint to provide services to the mid-market executive compensation and benefits markets which are currently underserved,” said WealthPoint’s Managing Partner, Ryan Barradas. “Jim’s background, relationships, experience and expertise are unrivaled.”

Founded by James Clary, Clary Executive Benefits is an open-architecture full service executive benefits firm, serving corporate America. Among their many services, ClaryEB will be helping WealthPoint’s corporate employers in the design and implementation of nonqualified retirement programs. For those WealthPoint clients who have already adopted nonqualified plans, ClaryEB will assist in the process of identifying and selecting a third-party administrative platform for their nonqualified benefit plans, assisting in the negotiation of the service contract, plan conversions, and finally ongoing monitoring and benchmarking of the administrator’s performance.

Equally important, ClaryEB will assist WealthPoint’s clients in the evaluation, selection, and implementation of informal funding and benefit security strategies, designed to reduce the overall financial impact of the benefit plan while enhancing the plan participant's security. “Our independent open-architecture approach provides us a greater capacity to deliver an expanded array of tailored executive financial benefit solutions and complementary services that will meet the economic corporate challenges of the future,” said Clary.

About WealthPoint

WealthPoint is headquartered in Phoenix, Arizona and specializes in providing a holistic approach to succession, exit and wealth transfer planning. WealthPoint serves affluent families and middle-market, family-owned and controlled companies throughout the United States. The company’s

unique process combines thorough discovery, collaborative and flexible solutions, and an unbridled commitment to implementation and on-going support. WealthPoint is a Member firm of M Financial Group, one of the nation's premier financial services design and distribution companies, serving the ultra-affluent and corporate markets through an exclusive network of more than 150 of the nation's most successful and innovative financial services firms. More information is available at www.wealthpoint.net.