



For Immediate Release

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WealthPoint Announces New Business Advisory Partner
Financial and Business Advisory Firm Expanding in Phoenix Marketplace

PHOENIX, February 21, 2018 – WealthPoint, a leading provider of business and life insurance advisory services with a focus on succession, exit and wealth transfer planning to entrepreneurial family groups and affluent clients throughout the U.S., has hired Frank Caputo, its newest Business Advisory Partner in their Phoenix office. “Bringing Frank onto our team enables us to continue to expand our business advisory services to serve family-owned businesses in the Phoenix market,” said WealthPoint’s Co-Managing Partner, Tim Young. “Frank’s experience of having owned and operated companies will be invaluable with helping our business-owner clients.”

Frank is a business owner with over 23 years’ experience in consulting, business development, strategic planning, operations and tactical execution within multiple industries. Frank has been active in the Phoenix market for over 10 years as a business owner and consultant, working with middle market businesses. His core belief and determination to put his client’s needs first, are directly aligned with WealthPoint’s mantra, *Know your story*™.

“I’m eagerly looking forward to joining the WealthPoint team,” says Frank. “I’m excited to join a firm that has the dedicated staff and best practices and processes in place to allow me to deliver tremendous value to our entrepreneurial and affluent clientele.”

About WealthPoint

WealthPoint is headquartered in Phoenix, Arizona and specializes in providing a holistic approach to business and life insurance advisory services with a focus on succession, exit and wealth transfer planning. WealthPoint serves affluent individuals, family groups and middle-market, family-owned and closely held 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. More information is available at www.wealthpoint.net.