ALPHA POINTE CAPITAL

On Pointe Email Bulletins!

What, you're not Ultra-High Net Worth!?!?? H.E.N.R.Y.'s wanted!!!

Look, I'm in the financial advisory business and I find it annoying when I see this….

"We only take Ultra-High Net Worth people" or "You need X dollars before we will even speak with you."

I guess some of those advisors have never heard of H.E.N.R.Y.*

Let me describe these people for you and my guess you already know H.E.N.R.Y quite well!

These people typically work hard, are leaders or high ranking in their companies, may be supporting families, likely participating in their company retirement plan, may have employee stock options, live in good neighborhoods, and are active participants in their communities.

So what's wrong with these folks?

My answer is there is absolutely nothing wrong with these folks except they're simply Not Rich Yet.

These people are High Earners Not Rich Yet types or H.E.N.R.Y's and they truly need the services of a quality financial advisor.

The problem is most financial advisors won't talk to them because, you guessed it, they are not Ultra High Net Worth (however that's defined) or don't have a certain minimum dollar amount threshold.

This is sad.

My years of experience has shown me that some of our best clients aren't always the Ultra High Net Worth but those that have invested in themselves so that they are on the path to becoming more financially secure. Sometimes these people may become Ultra High Net Worth and I get to guide them along their journey.

But everyone starts somewhere and sometimes it takes time and PLANNING to build their retirement assets.

H.E.N.R.Y's tend to be in the "accumulation" phase of their financial lives and this stage often needs just as much time and attention, sometimes more, than those that are in the "distribution" phase of retirement.

At Alpha Pointe Capital we like and service H.E.N.R.Y's. But before you think we accept everyone we talk to we don't. We can't run a business servicing everyone under the sun.

Let me explain.

We don't set minimum requirements because we want the opportunity to include people that are a good "fit" for us. AND we need to be a good fit for you. It works both ways.

What is a good fit for us? Some of the criteria we look for in new clients are in how I described H.E.N.R.Y….

But the best way to determine a good fit is to have a conversation with us. No statements or lengthy presentations just start with a conversation and we'll see where it goes.

Let's chat! We accept appointments between 1-3pm EST Monday-Fridays * or suggest a more suitable time. Email Info@alphapointecap.com to reserve your 30 minute time slot today, indicate date, time, number, and the topic you'd like to discuss and we'll confirm your appointment.

*NYSE Holidays and Advisor availability are subject to change.