About Point Wealth, LLC

Point Wealth, LLC is an independent financial planning and investment management firm led by Jeremy Reif, CRPS® and Jere Smith, CFP®, CLU®. With advanced credentials and training in retirement planning and financial planning, Jeremy and Jere specialize in helping pre-retirees and retirees pursue financial independence. Their mission is helping clients successfully transition and live in retirement without feeling burdened by financial stress or uncertainty. Based in Wausau, Wisconsin, Point Wealth serves clients throughout the state, including in Marshfield, Stevens Point, Minocqua, Eagle River, Appleton, Green Bay, and Eau Claire. To learn more, visit **http://pointwealthmanagement.com** and connect with **Jere** and **Jeremy** on LinkedIn.

Jeremy Reif, CRPS®

Jeremy Reif is an independent financial advisor with more than a decade of experience in the financial services industry. He is also the owner of Point Wealth, LLC, an independent financial planning and investment management firm. With advanced credentials and training in retirement planning and financial planning, Jeremy specializes in helping individuals and families pursue financial independence.

Regardless of the services he's providing, he focuses on talking openly about financial planning, the industry, common questions about retirement planning, and more to help everyday investors gain more confidence in their financial opportunities. Based in Wausau, Wisconsin, Jeremy serves clients throughout the state and can work virtually with clients throughout the country. To learn more, visit **http://pointwealthmanagement.com** and connect with **Jeremy** on LinkedIn.

Jere Smith CFP®, CLU®

Jere Smith is a financial advisor at Point Wealth Management, an independent financial planning and investment management firm. Serving individuals, families, and privately-owned businesses, he helps great people create great financial success through his services, including financial planning, retirement planning, estate planning, charitable giving strategies, and portfolio management.

Along with nearly a decade of experience, he is a CERTIFIED FINANCIAL PLANNER™ professional and Chartered Life Underwriter, two of the most esteemed designations in the industry. He is passionate about education, whether it's providing it to clients or adding to his own knowledge, and has written an article that appeared on FORTUNE.com. Based in Wausau, Wisconsin, Jere serves clients in multiple states. To learn more, visit **http://pointwealthmanagement.com** or connect with **Jere** on LinkedIn.

How Can We Help

How Can Point Wealth Help?

Retirement is one of life's greatest milestones and, as a result, many pre-retirees are worried about making the leap. Have they saved enough money? Will they be able to maintain their current standard of living? When should they claim Social Security?

Specializing in serving pre-retirees and retirees, our goal is to help them realize their retirement savings and overcome the insecurities that come with taking this major step. Through financial planning, retirement consulting, Social Security maximization strategies, IRA and 401(k) rollovers, and asset management, we seek to help our clients pursue financial independence through smarter investing practices.

Throughout the process of developing your financial strategies, we aim to remain wholly transparent, from the recommendations we make to the fees we charge. We believe confidence requires knowledge, so we aim to empower you with objective information to make informed decisions. There's no greater satisfaction for us than when we can help alleviate the stress of planning and help someone we care about feel confident in their future.

Why Do Clients Choose Point Wealth?

We believe pre-retirees and retirees often choose to work with us because we are a high touch and proactive firm. We aim to be someone they can trust to guide them toward their ideal retirement. We genuinely care about our clients and we make every effort to ensure they recognize our concern for and interest in their best future. We work hard to stay up-to-date on the latest market changes and planning opportunities so our clients can instead focus on their passions in life.

As an independent firm, clients can know that their best interests are our best interests. We aren't incentivized to promote or sell any specific products. We have access to thousands of investment options and strategies so we can construct a plan and portfolio that aligns with your risk tolerance, time horizon, circumstances, and needs.

How to Get Started

Helping so many people in our community drives us every day in our careers. We enjoy meeting with individuals, couples, and families approaching or living in retirement to learn about their goals and see if we may be able to help. To schedule a complimentary financial consultation, or to get a second opinion on your current retirement strategies, contact our office today by calling 715-870-2450.

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Investment Advisory Services offered through Retirement Wealth Advisors, (RWA) a Registered Investment Advisor. Point Wealth Management and RWA are not affiliated. Investing involves risk including the potential loss of principal. No investment strategy can guarantee a profit or protect against loss in periods of declining values. Opinions expressed are subject to change without notice and are not intended as investment advice or to predict future performance. Past performance does not guarantee future results. Consult your financial professional before making any investment decision. Jeremy J. Reif is a Registered Representative of and offers securities through TCM Securities, Inc., Member FINRA/SIPC Guarantees are backed solely by the claims-paying ability of the issuing insurance company. | Niether TCM nor Point Wealth are affiliated with any governmental agency or Social Security Administration.