

Beyond Wealth Management



THE STRATEGIC ADVANTAGE OF INTEGRATED LIFE COACHING

Because financial decisions are rarely just financial.

**At OnePoint BFG
Wealth Partners, we
believe wealth should
support a well-designed
life — not complicate it.**

**Major financial decisions are often
tied to:**



Purpose shifts



Career changes



Family transitions



Divorce



Retirement



Loss of a loved one



Leadership or career pressure

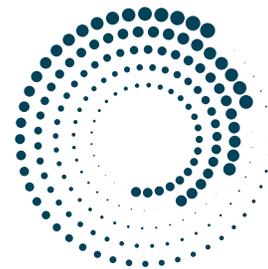
**Most advisory firms address the numbers.
We address the person making the decisions.**

What's In It For You?

- **Greater Decision Confidence** — Clearer thinking during major transitions.
- **Reduced Emotional Risk** — Fewer reactive or stress-driven financial moves.
- **Stronger Relationships** — Better communication around money and expectations.
- **Aligned Retirement Planning** — A life vision to match your financial plan.
- **Performance at the Top** — Leadership clarity, stress management, and resilience.

**This is not an add-on service.
It is a strategic advantage.**

Where **Life Coaching** Creates Measurable Value



Major Life Transitions

Retirement. Business sale. Divorce. Loss. Children launching or returning home. Caring for aging parents.

Financial plans can unravel when emotions run high.

Our Life Coach helps clarify priorities, process change constructively, and make aligned decisions.

Retirement With Purpose

Financial freedom without personal direction can feel disorienting.

We help you define:

- **What energizes you now**
- **The impact you want to have**
- **What a meaningful week looks like**
- **How to transition identity without losing drive**

Your advisor builds the financial runway.

Our Life Coach helps you decide where to land.

Leadership & Performance

For clients who lead organizations or families, coaching supports:

- **Leadership development**
- **Communication clarity**
- **Conflict navigation**
- **Burnout prevention**
- **Resilience under pressure**

When leaders grow, outcomes improve — personally and financially.

What Makes This Different



Most firms optimize portfolios.

We optimize **decision-makers**.

Traditional Advisory vs. OnePoint Integrated Model

- **Traditional:** Asset allocation focus
OnePoint: Asset allocation + human alignment
- **Traditional:** Reactive during crises
OnePoint: Proactive before stress escalates
- **Traditional:** Retirement math
OnePoint: Retirement meaning
- **Traditional:** Portfolio risk management
OnePoint: Portfolio + emotional risk management

High net worth often increases complexity.

Integrated Life Coaching is risk management at the human level.

**Wealth is a tool.
Alignment is the objective.**

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