Media Contact:
Dynasty Public Relations
Sally Cates, 212-373-1000
sallycates@dynastyfinancialpartners.com

Towerpoint Wealth Launches as an Independent RIA in Partnership with Dynasty Financial Partners

Sacramento, CA-Based Independent Financial Advisory Firm Will Offer Wealth Management for Corporate Executives, Professionals, Entrepreneurs and Families

NEW YORK, NY —July 26, 2017—Dynasty Financial Partners is pleased to announce that newly-formed Towerpoint Wealth has joined the Dynasty Network of Advisory firms.

Based in Sacramento, CA, Towerpoint Wealth was launched by financial advisor Joseph Eschleman. Mr. Eschleman has eighteen years' experience in financial services, most recently at Wells Fargo. The firm has a total of three employees - Joseph Eschleman, President, Lori McKinney, Director of Client Services and Nathan Billigmeier, Director of Research and Analytics. Ms. McKinney and Mr. Billigmeier are joining from Well Fargo Advisors.

Towerpoint Wealth is an independent financial advisory firm with a client focus on pre-retirees, retirees, business owners, corporate executives, industry professionals (technology in particular), and individuals who have recently experienced a significant life event, such as the death of a spouse, a divorce, or a job or career change.

"It's interesting that the Bay area has a significant number of RIAs, but in rapidly-growing Sacramento, the choices are few for fully-independent RIA firms. We see a real opportunity in the Sacramento region for a truly independent investment advisory firm to serve entrepreneurs, corporate executives and high net worth families," said Mr. Eschleman. "We are pleased to launch Towerpoint Wealth and believe we are well-positioned to capture market share and for future expansion."

"Joe and the Towerpoint Wealth team have deep ties to Sacramento, which is one of the fastest growing big cities in California. Towerpoint Wealth has a tremendous opportunity in this market with strong experience in working with wealthy entrepreneurs, executives and their families in developing long-range financial planning strategies," said Shirl Penney, Dynasty's CEO. "The West Coast has been a hotbed of activity in the independent space and we are proud to welcome Towerpoint Wealth as another Dynasty Network Advisory Firm in California. We look forward to partnering with them to serve their clients and to position the firm for future growth."

Towerpoint Wealth will engage with Dynasty on building out their practice management, including marketing and branding, and in streamlining their compliance, operations, reporting, investment research, trusts, insurance, capital markets, and custodial facilities.

Towerpoint Wealth has formed strategic partnerships with some of the industry's leading providers, including Schwab Advisor Services. Dynasty Financial Partners will provide robust analytics and operational support that will allow the firm to continue delivering objective and personalized service at a high level.

For more information, please visit www.towerpointwealth.com.

About Dynasty Financial Partners

Dynasty Financial Partners develops, sources and integrates management capabilities for some of the industry's leading independent investment advisor firms. Dynasty's integrated platform services delivery chassis offers a customized, open-architecture wealth management solutions and technology platform, supporting advisors as they protect and seek to grow their clients' wealth. Dynasty's core principle is "objectivity without compromise," and the firm is committed to crafting solutions that allow investment advisors to act as true fiduciaries to their clients.

Dynasty Financial Partners has corporate offices in New York City, Chicago, Coral Gables, Florida and San Francisco. Visit our website for more information: www.dynastyfinancialpartners.com.

Also visit Dynasty on social media:

LinkedIn: https://www.linkedin.com/company/dynasty-financial-partners
Twitter: @DynastyFP
Youtube: http://bit.ly/1MKXhC8