

Your organic growth engine.

Where strategic advice meets the technology that activates it.

Led by senior wealth management practitioners with decades of combined experience leading and advising wealth firms, EPOK Advice and Atlas Point meet firms where they are and deliver a rapid growth assessment that turns organic growth strategy into execution.



Rick Risley, Financial Professional, 45 years in business.

"Atlas Point has helped me grow my business by \$19mm in Net New Assets."

The Essential Elements of Organic Growth

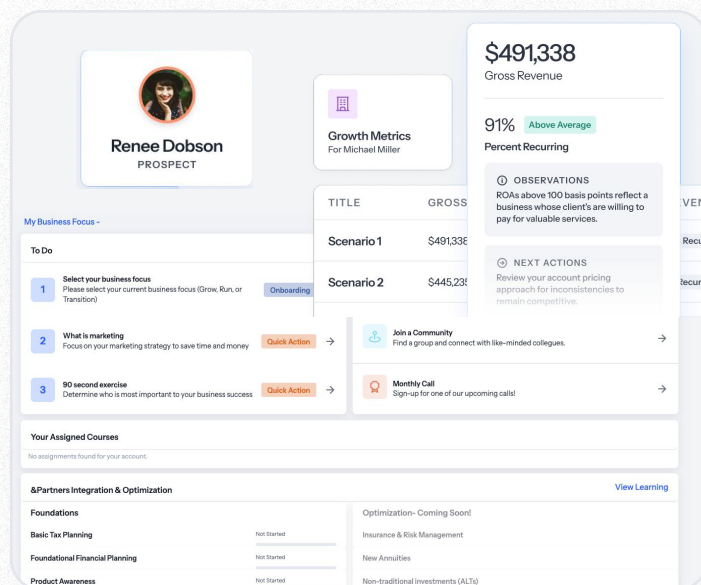
- Actionable insights:** Prioritized recommendations your teams can execute immediately.
- Accelerated Execution:** Proven IP, frameworks, and behavioral tools that help firms move faster.

The Power of EPOK Advice + Atlas Point

We combine two capabilities that are rarely delivered together.

Vision and Strategy (EPOK Advice): EPOK Advice partners with boards, CEOs, and growth leaders across wealth, asset management, and private equity on the future of advice. The Rapid Growth Assessment is how we turn that strategy into execution.

Strategic Execution (Atlas Point): A configurable platform that absorbs a firm's existing content, programs, and processes with behavioral discovery, growth metrics, and coaching that reinforces adoption.



Your Path to Organic Growth.



Carrie Nelson

CEO and Founder, Atlas Point



Kendra Thompson

Principal and Founder, EPOK Advice

EPOK Advice and Atlas Point bring decades of experience helping wealth firms grow, transform, and adapt to the future of advice.



+ More Qualified Team Members

Get Started Today

[Contact Us](#)

Our Solutions

Designed to identify and activate the highest-impact opportunities for organic growth.

1

Rapid Growth Assessment

We gather data to understand your current state and apply our proprietary capability map, producing an advisor journey, a gap analysis, and action plan in 6-9 weeks.

2

White-Labeled Tech & Content

Using our proven solutions, bespoke to your firm, we accelerate your growth agenda.

3

Analytics for Tracking Measurable Growth

Tracking tools that measure adoption and progress against growth priorities.

4

Strategic Practice Review

A senior-led review that helps high-growth advisors and practice teams think and operate like CEOs to unlock the next stage of growth.

Our Difference



Expertise

Senior practitioners who have run wealth businesses with technology and science to accelerate your program.



Complementary

Designed to absorb what you already have and accelerate where there are gaps.



Behavioral

We combine decades of behavioral research, packaged into discovery and decision tools your advisors will use.



Outcomes

Lift you can prove within 6-months. Programs your advisors adopt because the work was done with them.

Get started today!

[Contact Us](#)