

DecisionPoint Services, LCC

RAISING AWARENESS AND DECISION-MAKING WISDOM ONE MIND AT A TIME

UNBIASED AND IMPARTIAL

DecisionPoint Services, LLC has provided unbiased and impartial financial services since 1987 acting as Investment management consultants (CIMA) and investment fiduciary analysts (AIFA) to individuals, trusts, endowments, pension, cash balance and 401k plans, and as advanced insurance planning specialists to individuals and businesses.

ABOUT DECISIONPOINT SERVICES

DecisionPoint Services, LLC is a decision development and support company that uses a proprietary system of interactive services to:

- Increase a participant's awareness on 25 key 'vitals' for overall wellbeing
- Improve their critical assessment and decision-making skills
- Apply those skills to identifying 'vitals' they choose to address
- Facilitate action

Our services: **QuickCheck™**, **QuickChat™**, **SoundingBoard™** and **PicturePlan™**

Since 2006, DecisionPoint's non-commercial content has been used by used by corporations, non-profit organizations, universities, federal agencies, the State of Michigan, municipalities, and several state regulatory bodies.

DECISIONPOINT BACKGROUND

DecisionPoint **QuickCheck™** programming and content was first introduced to the public as part of the \$1.4 billion SEC Global Settlement against 10 large Wall Street firms for illegal late trading and market timing practices. As part of the settlement, the Securities and Exchange Commission (SEC), New York Stock Exchange (NYSE) and the National Association of Securities Dealers (now FINRA) authorized a nationwide series of investor protection seminars in partnership with the American Library Association (ALA), and educational programming developed by state securities regulators. DecisionPoint content contributed to both the national and state-level initiatives as described in the following pages.



DecisionPoint Services

SEC GLOBAL SETTLEMENT: EDUCATIONAL PROGRAMMING

- Lead presenter of the for the State of Michigan as part of the initial, 20-state rollout of the *Investor Education @ Your Library*® nationwide series of investor protection seminars, which included the first iteration of DecisionPoint's proprietary decision development and support program, **QuickCheck**™. Funding for this series was provided through the Investor Protection Trust, Washington, DC as authorized by the SEC, NYSE and FINRA in the 2003 SEC Global Settlement.
- Content developer of the *Investing Fundamentals* series of educational programs for the State of Michigan (under Governor Jennifer Granholm) as part of the nationwide *Investor Education @ Your Library*® initiative sponsored by the American Library Association (ALA) with funding from the Investor Protection Trust, Washington, DC. DecisionPoint's **QuickCheck**™ was an integral part of the program.
- Content developer of the *Investor Education in Your Community*® initiative sponsored by the State of Michigan Office of Financial and Insurance Regulation (OFIR) with funding through the Investor Protection Trust, Washington, DC. DecisionPoint's **Checklist System**™ was an integral part of the program.
- Developer of educational, investor-advocacy content for the Pennsylvania Department of Banking and Securities in association with the AARP Foundation. DecisionPoint's **Checklist System**™ was an integral part of the program.

FEDERAL AND STATE

- Developer and presenter of financial education/investor protection programs to IRS-Criminal Investigation and Department of Homeland Security (DHS) Federal Bldg., Detroit, MI with funding through the Michigan Department of Insurance and Financial Regulation (DIFS). DecisionPoint's **Checklist System**™ was an integral part of the program.
- Lead content developer and kick-off keynote speaker for Governor Rick Snyder's/State of Michigan's *Reinventing Mi Retirement* multi-year educational initiative. [Click Here](#) and [Click Here](#) DecisionPoint's **QuickCheck**™ was the centerpiece of this statewide initiative.
- Developer of the Michigan Department of Insurance and Financial Services' (DIFS) *Securing Mi Financial Future* (SMIFF) statewide employee wellness/consumer awareness initiative for state employees, private sector employers, and not-for-profits statewide. DecisionPoint's **QuickCheck**™ was the centerpiece of this initiative.
- Developer and host of the Detroit Public Television program *Be a Money Smarty* broadcast with funding by the State of Michigan Securities Education Trust. [Click Here](#)
- Creator of the Federal Reserve Bank's Michigan Money Smart Week® *Be a Money Smarty "Lightning Round"* program, regarded as a national 'best practices' education model by the FRB, Chicago. DecisionPoint's **QuickCheck**™ was part of this program.

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COMPANIES

Creator of *Be a Money Smarty!* for General Motors Corporation. Nominated by General Motors Corporation for a 2015 Eddy Award sponsored by *Pensions & Investments*. Funding through the Investor Protection Trust, Washington, DC. DecisionPoint's **Checklist System™** was the centerpiece of this program.

Other Companies:

- Mercedes Benz Financial, Global Headquarters, Farmington Hills, MI
- Ford Motor Company, Rawsonville, MI
- La-Z-Boy Furniture, Corporate Headquarters, Monroe, MI
- Herman Miller Furniture, Corporate Headquarters, Zeeland, MI

UNIVERSITIES

Creator and lead developer of the *My Money and Me* video series for statewide public use in collaboration with Michigan State University Extension (MSUE) and offered through the Cooperative Extension System of land grant universities. [Click Here](#). DecisionPoint's **Checklist System™** was an integral part of the program. Funding for the series was through the Michigan Department of Insurance and Financial Services (DIFS).

Other Universities:

- Michigan Tech University, Houghton, MI
- Marygrove College, Detroit, MI

DecisionGroup, LLC

DecisionPoint Services, LLC is a subsidiary of DecisionGroup, LLC. Also part of DecisionGroup, LLC are: DecisionGuide Financial, LLC, DecisionPoint Health Analytics, LLC, DecisionPoint Analytics and Business Intelligence, LLC, and Lakeside Productions, LLC.



Our newest subsidiary, DecisionPoint Health Analytics, is applying our acumen and broad-scope understanding of the financial services industry to the healthcare industry. Our first-hand experience in healthcare over the last five years confirms our conviction that healthcare is undergoing reforms in 5 key areas that are highly analogous in both form and magnitude to the reforms we witnessed in financial services over the past 20 years.

DecisionPoint Services' "been there, seen this" vantage point allows us to anticipate where and how get ahead of the curve as regulatory mandates and market dynamics continue to reform the present state of the healthcare industry.