

# DecisionPoint

CONSUMER ADVOCACY AND INVESTOR PROTECTION SINCE 2006

## 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.

In addition to providing financial services, DecisionPoint has created and delivered one-of-a-kind consumer advocacy/investor protection programming since 2006 to corporations, non-profit organizations, municipalities, the State of Michigan, and several state regulatory bodies.

## DECISIONPOINT QUICKCHECK™

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 \$53 million for a nationwide series of investor protection seminars in partnership with the American Library Association (ALA), and \$27 million for educational programming developed by state securities regulators. DecisionPoint founders and DecisionPoint content contributed to both the national and state-level initiatives as described in the following pages.

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## 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 one-on-one counseling, the first iteration of **QuickCheck**™. Funding 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.

## 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

## ABOUT DECISIONPOINT SERVICES, LLC

DecisionPoint Services, LLC is a decision development and support company that uses a proprietary, one-on-one **QuickCheck™ and QuickChat™** system to increase one's critical assessment skills and their ability to make informed and beneficial decisions when dealing with significant and often stressful life events and financial matters.

## ABOUT DECISIONPOINT HEALTH ANALYTICS, LLC

Our subsidiary, DecisionPoint Health Analytics is applying our knowledge of the financial services industry to the healthcare industry. Our experience over the last five years in healthcare confirms our conviction that the carrier network model, health plan design, and the role of brokers who sell and service those plans are undergoing a transformation that highly-correlates to the reforms that took place in financial services over the last 20 years. DecisionPoint Analytics' "been there, seen this" vantage point allows us to anticipate where and how to get ahead of the curve as regulatory mandates and market dynamics continue to reform the present state of healthcare.