Epok Advice and Atlas Point Announce Strategic Partnership to Help Wealth Firms Systematize Organic Growth Through Advisor & Client Enablement

PRESS RELEASE

FOR IMMEDIATE RELEASE

Epok Advice and Atlas Point Announce Strategic Partnership to Help Wealth Firms Systematize Organic Growth Through Advisor & Client Enablement

Toronto, ON and Charlotte, NC - January 5, 2026 - Epok Advice, a boutique strategy and executive advisory firm serving leaders across wealth management, asset management, and WealthTech, and Atlas Point, an advisor and client enablement platform built to personalize and deepen human connections at scale, today announced a strategic partnership focused on making organic growth more repeatable - without losing the quality of the advisor-client conversation - through practical solutions that meet financial professionals and their firms where they are.

Wealth firms are investing heavily in growth, but many struggle to translate ambition into field adoption. The Epok x Atlas Point partnership brings together Epok's senior-led growth strategy and execution support with Atlas Point's enablement approach - grounded in what works, designed to close capability gaps, and then systematized through technology and workflow.

A shared focus: enablement that closes capability gaps - and scales best practices

The partnership will focus on advisor and client enablement across the full organic growth lifecycle:

- clarifying the firm's growth story and segmentation,

- identifying where advisors and teams lose momentum (process, confidence, consistency, workflow friction), and
- embedding best practices into repeatable motions - supported by technology designed for practical use in the flow of work.

A near-term joint priority is growth metrics for advisors - designed to help advisors run their practices with greater clarity and consistency, with guided prompts and pre-populated insights that move beyond static "plans" to real behavior change.

Elevating expertise on both sides of the partnership

As part of the partnership, Carrie Nelson and Kendra Thompson will each serve as strategic advisors within the other's ecosystem - strengthening go-to-market clarity and accelerating the development of practical, insight-led enablement for wealth firms.

Carrie Nelson will be profiled within Epok's ecosystem as a **Strategic Advisor**

bringing deep wealth management consulting, strategy, and data-driven leadership experience. Nelson gained expertise as a data strategy leader at Experian, a Principal at EY, and the Head of Firm Strategy and Strategic Planning at Edward Jones, and is widely recognized for her work at the intersection of behavioral finance, advisor enablement, and the evolving RIA and WealthTech landscape.

Kendra Thompson will be profiled within Atlas Point's ecosystem as a **Strategic Advisor**

bringing a track record advising boards and executive teams on growth, advisor experience, high performance sales, operating model design, and large-scale transformation execution - including AI-enabled workflows, digital enablement, and organizational change.

Quotes

"Epok Advice advises leading wealth management firms on their highest-stakes priorities - growth, advisor experience, and transformation execution. What we hear consistently is a demand for measurable organic growth enablement that actually lands in the advisor workflow. Atlas Point offers a proven, insight-led approach to enabling advisors and clients - making it a strong fit for what our clients are asking for," said Kendra Thompson, Founder & Principal of Epok Advice.

"Firms are investing heavily in growth, but advisors are still being asked to stitch together disconnected tools and initiatives which is one factor contributing to a low 4% organic growth rate" said Carrie Nelson, Founder & CEO of Atlas Point. "Atlas Point turns behavioral insight into a guided experience that supports deeper client connections through practical, easy to apply solutions as well as advisor education to boost productivity and meet more complex client needs. Partnering with Epok Advice strengthens how we bring our advisor and client insights to market, pairing senior strategic advisory support with an organic growth platform designed for adoption."

About Epok Advice

Epok Advice is a boutique consulting firm offering strategy and executive advisory support to leaders across wealth management, asset management and WealthTech, with a focus on flexible, on-demand support including strategic growth planning, board and executive facilitation, operational transformation, and digital solutions that enhance the client experience.

Media Contact: hello@epokadvice.com | 416-894-5748

About Atlas Point

Atlas Point provides financial services firms and their professionals with a proprietary, behavioral-powered growth system that personalizes and deepens human connections at scale. Atlas Point's team brings experience across wealth management consulting, product development, and strategy roles within the industry, with a bespoke organic growth solution designed to support your firm’s financial professionals and their clients.

Contact: contact@theatlaspoint.com | 704-350-5475

Job Posting: Intern – Wealth & Asset Management

hello@epokadvice.com