

# Blakely Financial, Inc. Rebrands as ShorePoint Advisory Group

*Marking 30 Years of Guiding Clients  
Toward Clarity and Confidence*

MARBLEHEAD, MA, UNITED STATES,  
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EINPresswire.com/ -- As it celebrates 30 years in business, Blakely Financial Inc., is proud to announce its rebrand to [ShorePoint Advisory Group](#) a name that reflects its legacy and its future.



SHOREPOINT  
ADVISORY GROUP

Blakely Financial, Inc. Rebrands as ShorePoint Advisory Group

This evolution honors the firm's history while embracing the next chapter in its growth. The new name captures the essence of what the firm has always done best: bringing clarity and calm to complex financial lives and helping families move confidently toward their goals.

“

I have had the privilege of growing with this firm for the past eight years, learning from incredible mentors and serving clients who inspire me every day.”

*Emily Promise, CFP®, CAP®*

The transition to ShorePoint Advisory Group symbolizes both continuity and growth, acknowledgement of the firm's enduring values and expanding capabilities. The firm continues to serve high-net-worth individuals, families, and business owners across the country through comprehensive wealth management, financial planning, and family advisory services.

“This new chapter reflects both who we've become and where we are going,” said [Emily Promise, CFP®, CAP®](#),

CDFA®, AIF®, APMA®, CRPC®, CEO and Financial Advisor at ShorePoint Advisory Group. “I have had the privilege of growing with this firm for the past eight years, learning from incredible mentors and serving clients who inspire me every day. Rebranding as Shore Point Advisory Group honors the strong foundation built over three decades while embracing the future – with a renewed commitment to guide our clients and their families with clarity, confidence, and care through every stage of their financial journey.”

At ShorePoint Advisory Group, the firm remains deeply committed to its founding principles: A client-first mindset rooted in trust and transparency

Personalized relationships built on intentional listening and collaboration  
Strategic insight for generational planning that supports long-term success and legacy

With offices across North Carolina and Massachusetts, serving clients across the country, the firm provides comprehensive financial planning, investment management, business succession, and endowment services. Through thoughtful coordination with clients, attorneys, CPAs, and other professionals, ShorePoint helps align every financial decision with personal goals and values.

The rebrand follows the firm's recognition as a 2024 Forbes Best-in-State Wealth Management Team by SHOOK Research (awarded under the previous name, Blakely Financial Inc.) and marks a major milestone in its history of client-focused innovation and integrity.

Clients and partners can explore the firm's refreshed identity at [www.shorepointadvisorygroup.com](http://www.shorepointadvisorygroup.com). Email addresses have also been updated to align with the new name and can now be reached at [info@shorepointadvisorygroup.com](mailto:info@shorepointadvisorygroup.com).

#### About ShorePoint Advisory Group:

Founded in 1995 as Blakely Financial, Inc., ShorePoint Advisory Group provides complete and connected financial planning for individuals, families, and institutions. With a holistic approach that integrates retirement, tax, estate, and investment strategies, the firm helps clients bring order to complexity and confidence to every decision. The firm maintains offices in High Point, NC; Manchester-by-the-Sea, MA; Marblehead, MA; Nantucket, MA; and Western, MA, serving clients nationwide.

2025 Forbes Best In State Wealth Management Teams, created by SHOOK Research. Presented in Jan 2025 based on data as of March 2024. 11,674 Management Teams were considered, approximately 5,300 teams were recognized. Not indicative of advisor's future performance. Your experience may vary. For more information, visit

<https://www.forbes.com/sites/rjshook/2025/01/09/methodology-best-in-state-wealth-management-teams-2025/>.

ShorePoint Advisory Group is located at 1022 Hutton Lane, Suite 109 High Point, NC 27262 and can be reached at 336-885-2530. Securities and advisory services offered through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services are separate from and not offered through Commonwealth Financial Network.

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