

# Northpoint Wealth Financial Services, LLC

## Part 2B of Form ADV Brochure Supplement

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### Gene Bishop

5921 E 97th St

Tulsa, OK 74137-5011

(866)420-7315

**This brochure supplement provides information about Gene Bishop that supplements the Northpoint Wealth Financial Services, LLC brochure. You should have received a copy of that brochure. Please contact us at (866) 420-7315 if you did not receive Northpoint Wealth Financial Services, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Gene Bishop is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **Item 2 Educational Background and Business Experience**

### **Gene Bishop**

5921 E 97<sup>th</sup> St  
Tulsa, OK 74137  
(918) 518-5910  
CRD: 4526655

68, founded Northpoint Wealth Financial Services, LLC in 2013. Mr. Bishop is Managing Member and principal owner of The Firm. Mr. Bishop additionally serves as Financial Advisor and Chief Compliance Officer.

### **Education and Business Experience**

Mr. Bishop has a BSBA degree in Management from The University of Tulsa (1977).

Mr. Bishop has an MBA degree from Oklahoma City University (1993).

For nearly 25 years, Mr. Bishop served as CFO and Controller and other senior management positions in public and private companies. These businesses had specialties in healthcare, environmental, retail and wholesale distribution. Mr. Bishop developed a management consulting enterprise consulting in healthcare, manufacturing, and energy sectors.

Mr. Bishop has been a Financial Advisor for over twenty years. He began his career with Edward Jones in 2002 as a Registered Representative. As a Registered Representative he received registrations with FINRA Series 7, 24, and 63. He is an Investment Advisor receiving a Series 66 registration with FINRA. He is no longer dually registered serving as a Financial Advisor. He is an independent, licensed insurance agent in Oklahoma.

## **Item 3 Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation. No information is applicable to this Item.

## **Item 4 Other Business Activities**

Mr. Bishop's Other Business Activities:

- Saving Oklahoma's Future, Inc. President, 4/2012 to present, less than 2 % of time
- Northpoint Wealth Insurance Design, LLC, President, 01/2013 to present, less than 2 % of time
- Member of Board, Parent Child Center of Tulsa, Inc., less than 2 % of time
- Member of Board, Immediate Past President, Tulsa Chapter Financial Planning Association, less than 2 % of time

## **Item 5      Additional Compensation**

Mr. Bishop does not receive any additional economic benefit from third parties for providing advisory services.

## **Item 6      Supervision**

Mr. Bishop is the Managing Member and Chief Compliance Officer for Northpoint. If you have any questions regarding supervision, please call (866) 420-7315.

## **Item 7      Requirements for State-Registered Advisers**

No information is applicable to this Item.