



MONEY DOESN'T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you're not alone.

[What Makes Us Different](#)

[Schedule an appointment](#)

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free resources.

By continuing to use this site, you consent to our use of cookies.



3 Methods to Not Run Out of Money



4 Common Mistakes People Make With Their First Million



7 Secrets to Accumulating Your First Million



7 Tips to Successfully Transfer Wealth to Your Kids



8 Legitimate Tax Loopholes You May Be Missing



8 Blunders to Avoid in Retirement

[Get more Insights](#)

By continuing to use this site, you consent to our use of cookies.

Forbes

FORBES TOP-RANKED TEAM



InvestmentNews
ICONS&
INNOVATORS

People deserve to understand what's
happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking

By continuing to use this site, you consent to our use of cookies.

At Navion Financial Advisors, we believe clients should understand everything that is happening with their money; that advisors should be just as good about explaining investments as they are at making them.

- + What are you going to do with my money?
- + Can you handle the complexity of my situation?
- + How can you make my life easier?

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?



0-2%



2-4%



4-6%

By continuing to use this site, you consent to our use of cookies.



6-8%



More than 8%

Next

How to get started.



1. Schedule an appointment



2. Meet with us for a custom listening session



3. Get your personalized strategy

[Schedule an appointment](#)

[Watch Video](#)

By continuing to use this site, you consent to our use of cookies.

Schedule an appointment.

Please provide your name and email and we will have an advisor contact you.

First Name*

Last Name*

Email*

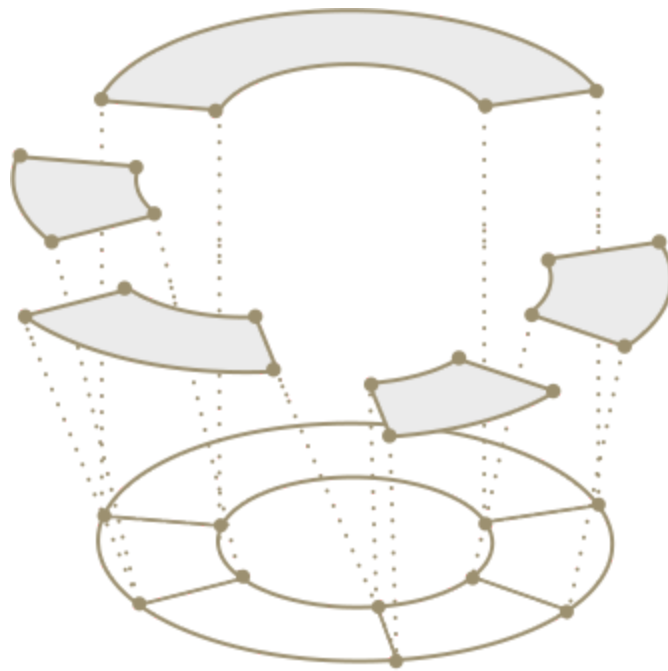
Phone Number*

Submit

Our financial planning services are built on trust,
transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams. [Explore services](#)

By continuing to use this site, you consent to our use of cookies.



Connect with an Advisor

Please provide your name and email and we will have an advisor contact you.

First Name*

Last Name*

Email*

Phone Number*

Submit

Personalized Wealth Management

Navion Financial Advisors mission is to provide our clients superior financial planning and investment services that align with their personal and corporate goals. We do this by utilizing the

By continuing to use this site, you consent to our use of cookies.

plan using extensive

research and industry resources. We are proud of our professionalism and high standard of ethics. We are a wealth management firm based in serving families, business owners, executives and institutions across the United States and in Europe. Our team provides the highest level of service for our local and national clients in financial planning and investment management. Contact us today and let Navion Financial Advisors help you on your financial journey.

INDEPENDENT. GENUINE. FINANCIAL PLANNING.



Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

[Read more](#)



Carson Partners

Carson Partners are growth-minded advisors wholly dedicated to helping clients reach a higher purpose for their wealth and design a lasting legacy for their families.

[Read more](#)



Our Locations

Navion Financial Advisors is headquartered in Davis, CA. Contact us today to speak with a wealth advisor or financial professional.

[Read more](#)

Insights

Navion Financial Advisors team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. [Read more](#)



News

BUSTING THREE HALF-TRUTHS ABOUT REVERSE MORTGAGES

A few years back, I conducted and published research in the *Journal of Financial Planning* that [By continuing to use this site, you consent to our use of cookies.](#) [es](#). In fact,

respondents scored below 50 percent on a 10-question true-false quiz.

[Read more](#)

Blog post

HOW TO BUY A CAR WITHOUT LOSING YOUR MIND (OR YOUR WALLET)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It's painful and annoying, I know I have to deal with it, but it's going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

[Read more](#)

Weekly Market Commentary

WEEKLY MARKET COMMENTARY – JULY 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

[Read more](#)

Navion Financial Advisors

[Home](#)
[Services](#)
[Insights](#)
[Team](#)
[About](#)

[Client Logins](#)
[For Advisors](#)
[Contact](#)
[Our Approach](#)

By continuing to use this site, you consent to our use of cookies.

Follow Us

Facebook

Twitter

LinkedIn

Headquarters

355 2nd St B

Davis, CA 95616

(530) 297-7441

[Email](#) | [Map](#) | [All Locations](#)

Subscribe to our newsletter:

First Name*

Last Name*

Email*

Phone Number*

Submit

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. It may not be used for the purpose of avoiding any federal tax penalties. Please consult legal or tax professionals for specific information regarding your individual situation. The opinions expressed and material provided are for general information, and should not be considered a solicitation for the purchase or sale of any security.

Forbes ranking is based on quality of practice, telephone and in-person interviews, client retention, industry experience, review of compliance records, firm nominations and quantitative criteria. Barron's rankings are based on data provided by over 4,000 of the nation's most productive advisors. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. InvestmentNews Icons and Innovators award recipients were selected based on the broad definition of, those who have conceived new ideas and tools that have propelled the industry forward. Listing in any publication is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the advisor by any client.

CWM, LLC is an SEC-registered investment advisor located in Omaha, NE. CWM, LLC and its representatives are in compliance with the current registration and/or notice filing requirements imposed upon SEC-registered advisors by those states in which we maintains clients.

2019 Navion Financial Advisors. All rights reserved. This content cannot be copied without express written consent of CWM, LLC. Wealth Designed. Life Defined. is a registered trademark of CWM, LLC and may not be duplicated.

Additional information about CWM, LLC and our advisors is also available online at www.adviserinfo.sec.gov or <https://brokercheck.finra.org/>. You can view our firm's information on this website by searching for CWM, LLC or by our CRD number 155344.

[Carson Privacy Policy](#) | [Terms of Use](#) | [Website Privacy Policy](#)

By continuing to use this site, you consent to our use of cookies.