MONEY DOESN'T HAVE TO BE COMPLICATED.

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

What Makes Us Different

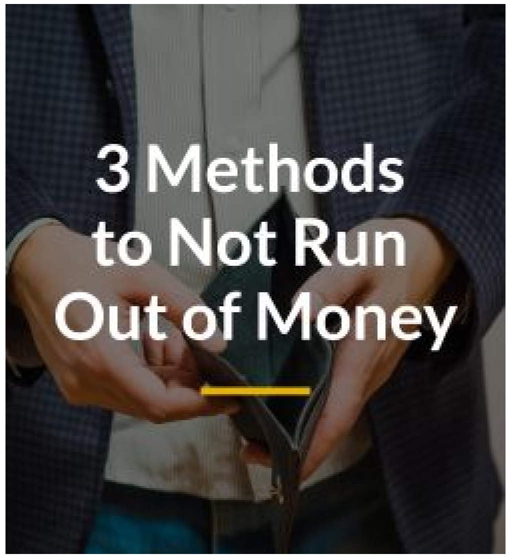
Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free resources.


3 Methods
to Not Run
Out of Money


4 Common
Mistakes
People Make
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First Million


7 Secrets to
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Your First
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FORBES TOP-RANKED TEAM

BARRON'S HALL OF FAME

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

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%

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

Schedule an appointment.

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

First Name*

Last Name*

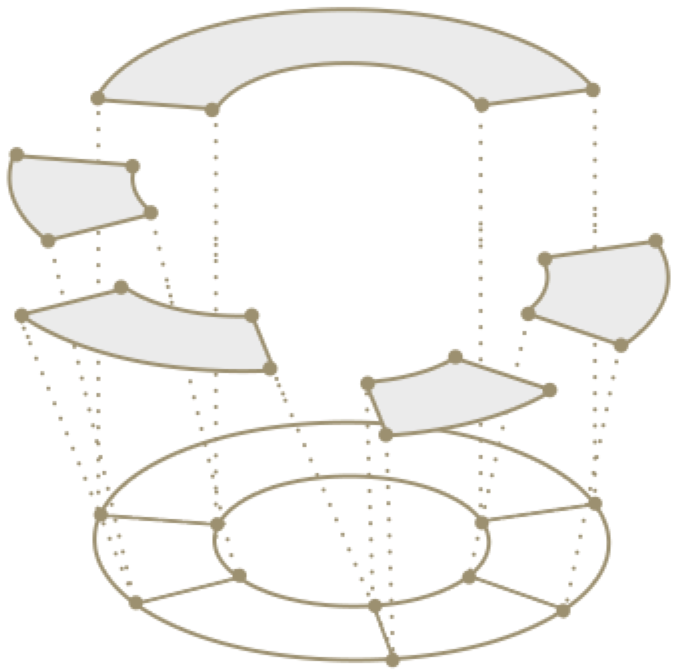
Email*

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



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 will help them to achieve their personal and corporate goals. We do this by utilizing the [obscured] 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* tha ... ges. 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.

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