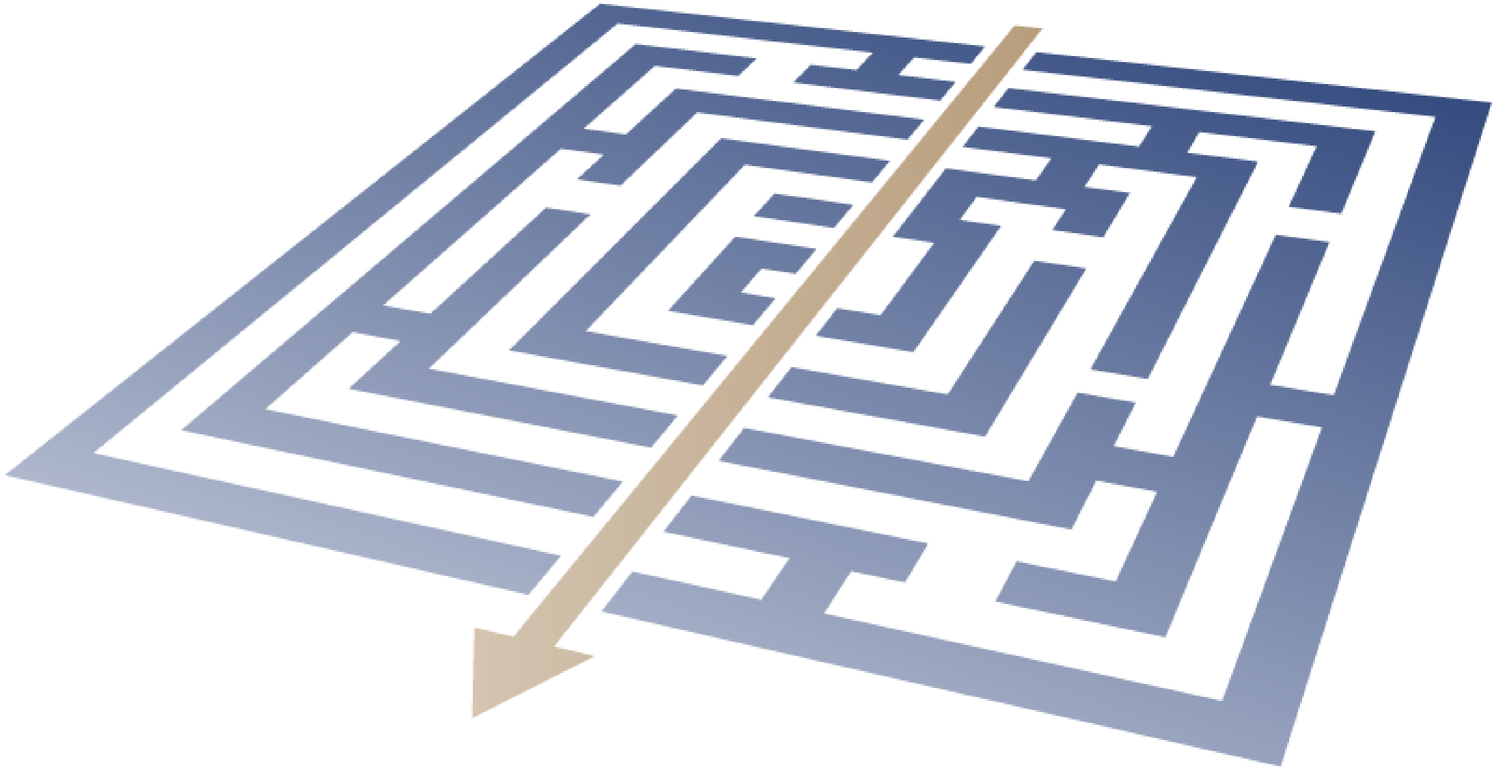


MONEY DOESN'T HAVE TO BE COMPLICATED.

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

What makes us different

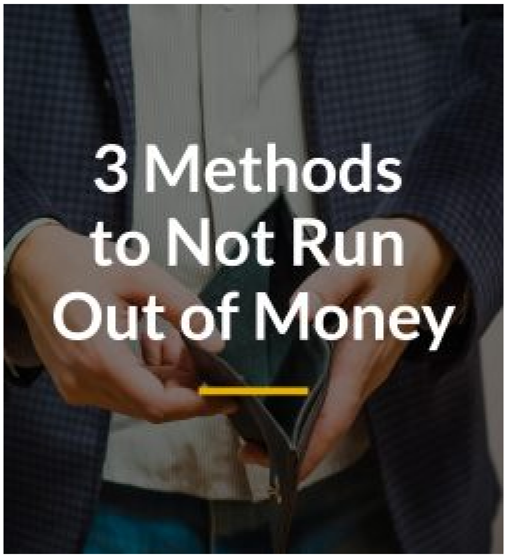
Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free g


3 Methods
to Not Run
Out of Money


4 Common
Mistakes
People Make
With Their
First Million


7 Secrets to
Accumulating
Your First
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FORBES TOP-RANKED TEAM

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 about your money, your life, and your future.

At NaviGuide Wealth Partners, we believe clients shou
everyth

be just as good about explaining investments as they a
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

Please provide your name and email and we will have an a

First Name*

Last Name*

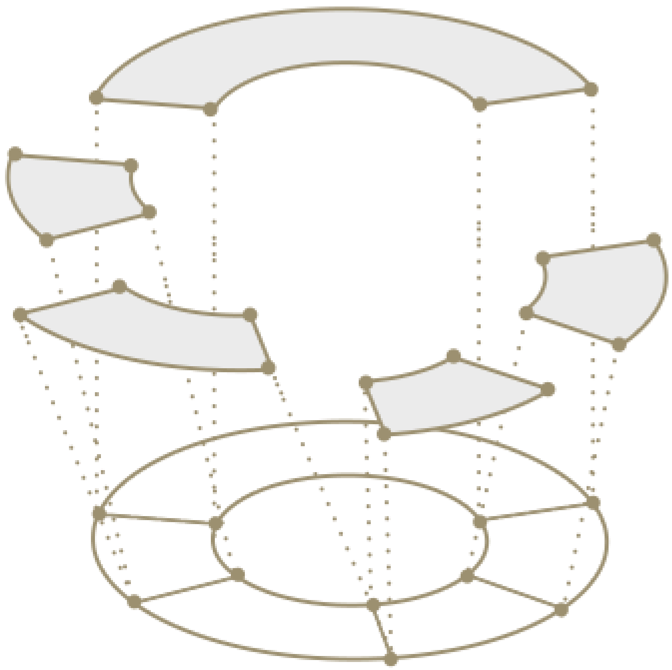
Email*

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



Personalized Wealth Manag

Without a roadmap, it can be difficult to travel the right financi
bumps and diversions along the way. Having a tailored strategy in
guiding you along the way, may make the road aheac

At NaviGuide Wealth Partners, our goal is to serve as your financial navigator. Offering innovative portfolio strategies, retirement planning, insurance and a number of other services, we help you chart a course designed to connect today's reality with tomorrow's goals. Through our interdisciplinary approach, we address your varied financial needs, goals and dreams, wherever life may lead you along the way.

Based in Agoura Hills, California, we work closely with clients throughout the United States. To learn more about our services or for a no-cost, no-obligation consultation, contact us today.

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.

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Carson Partners

Carson Partners is a network of growth-minded advisors with one common massive transformative purpose: to be the most trusted for financial advice.

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Our Locations

Headquartered in Agoura Hills, CA, NaviGuide Wealth Partners has office locations and advisors across the country. Contact us today to speak with a financial advisor or financial professional nearest you.

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Insights

NaviGuide Wealth Partners' 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 REVER

A few years back, I conducted and published research in the *Planning* that showed Americans don’t understand reverse respondents scored below 50 percent on a 10-question

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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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