

TIME TO SET SAIL

Before taking the next step in your financial journey, be sure you have the right co-captain to help you chart a smart route, navigate through rough waters and successfully reach your destination.

SEE HOW IT WORKS ([HTTPS://WWW.NAVIGOE.COM/PROCESS/](https://www.navigoe.com/process/))



"Navigoe's team of fee-only, CERTIFIED FINANCIAL PLANNER™ professionals help seamlessly manage all aspects of your financial life, providing peace of mind while protecting your family's future."

- SCOTT LEONARD

FEATURED IN

Los Angeles
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KTLA 5



WEALTH MANAGEMENT

Live the best life possible by collaborating with us to design a strategy, implement those plans and monitor your progress.

Learn more (<https://www.navigoe.com/services/wealth-management/>)



INVESTMENT CONSULTING

Protect and grow your wealth with a partner who carefully manages your portfolio to minimize risk and maximize returns.

[Learn more \(https://www.navigoe.com/services/investment-consulting/\)](https://www.navigoe.com/services/investment-consulting/)



EMPLOYER 401(K) PLANS

Get a helping hand updating your company's 401(k) offerings or starting a new retirement plan for your employees.

[Learn more \(https://www.navigoe.com/services/employer-401k-plans/\)](https://www.navigoe.com/services/employer-401k-plans/)



LIMITED ENGAGEMENT FINANCIAL PLANNING

Meet with our CERTIFIED FINANCIAL PLANNER™ professionals to get financial guidance without a huge commitment.

[Learn more \(https://www.navigoe.com/services/limited-engagement-financial-planning/\)](https://www.navigoe.com/services/limited-engagement-financial-planning/)



TRUSTS

Work with an estate partner who can help develop a trust that represents your financial legacy and continues your financial plan.

[Learn more \(https://www.navigoe.com/services/trusts/\)](https://www.navigoe.com/services/trusts/)

CLIENTS WE SERVE

We serve clients throughout the Los Angeles area, and even in different states. Being based in Redondo Beach, our clients are primarily in the South Bay cities of Redondo Beach, Hermosa Beach, Manhattan Beach, Torrance and the Palos Verdes Peninsula area.

[SEE IF WE'RE A MATCH \(/WHO-WE-SERVE/\)](#)



RETIREE OR LATE CAREER PROFESSIONAL

(/who-we-serve/#retiree-late-career-professional)



WORKING PROFESSIONAL

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LIFE TRANSITIONS

(/who-we-serve/#life-transitions)



BUSINESS OWNER

(/who-we-serve/#business-owner)



HOW WE WORK

Navigoe works closely with you to achieve true prosperity, focusing just as much on building your wealth as building our relationship with you. With our team by your side, you can look forward to feeling confidence and clarity every step of the way.

[LEARN ABOUT OUR PROCESS \(/PROCESS/\)](#)

MEET THE TEAM

Much like sailing, having a smooth financial voyage requires having the right crew. Each member of our team has a unique reason for choosing this profession, but we all share a common goal: to help you navigate to the financial life you always wanted.

[SHOW ME THE TEAM \(/ABOUT/\)](#)

LEARN THE ROPES

Get the latest financial updates and advice from our team.

(<https://www.navigoe.com/blog/charitable-giving-from-your-ira/>)

Charitable Giving From Your IRA

If you are over 70, making charitable gifts directly from you IRA may be your best tax move going forward. The Tax Cuts and Jobs Act, passed in December 2017, made three major changes that may significantly affect charitable giving, especially for those over 70. First, it increased the standard deduction to \$24,000 for married...

READ MORE ([HTTPS://WWW.NAVIGOE.COM/BLOG/CHARITABLE-GIVING-FROM-YOUR-IRA/](https://www.navigoe.com/blog/charitable-giving-from-your-ira/))



TAKE THE NEXT STEP IN YOUR FINANCIAL JOURNEY?

Get in touch to tell us more about your plans and see if we might be the right co-captain for you.

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Building the Unsinkable Portfolio

Navigoe Home Office
417 Beryl Street
Redondo Beach, CA 90277

[RESERVE YOUR SPOT \(HTTPS://WWW.EVENTBRITE.COM/E/BUILDING-THE-UNINKABLE-PORTFOLIO-TICKETS-57737833414\)](https://www.eventbrite.com/e/building-the-unsinkable-portfolio-tickets-57737833414)

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