NAVIS WEALTH MANAGEMENT

Company Overview

Navis Wealth Management is an independent boutique wealth advisory practice that specializes in developing customized wealth management strategies and financial plans for a select group of high-net-worth individuals and their families. Our clients include corporate senior executives and former executives, business owners, and entrepreneurs.

ability to anticipate our clients' needs and help them advance their long-term aspirations. The financial plans we design for our clients are comprehensive and holistic — based on the deep, personal relationships we forge with each and every one of our clients.

Our Mission

At Navis Wealth Management, we believe relationships matter. We don't force square pegs into round holes because we understand that wealth is not always about the numbers — it's about the people.

We are dedicated to finding prudent solutions and implementing disciplined strategies designed to enhance a client's overall financial construct. We provide deep insight and practical guidance to our clients — helping them navigate all of life's pivotal moments with confidence even as their goals and priorities change — as we weave all aspects of their lives, and their families' lives, into a cohesive whole.

As an independent Advisor, we are committed to fulfilling our fiduciary responsibility to our clients. The relationships we have with clients are symbiotic in that our interests are aligned with theirs. At Navis, we firmly believe success is a two-way street, and for us and our clients, it goes both ways. If we do a good job, our clients are successful. And if our clients are successful, we are successful.