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 (714) 893-5400



## Services

Most of our clients desire a work optional lifestyle. We work with you to keep your focus on what really matters.

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## What is your Risk Number?

Allow us to pinpoint your Risk Number and create a portfolio that matches your risk tolerance and comfort zone.

Click to obtain your free portfolio risk analysis. It only takes 5 minutes.

[Free Portfolio Risk Analysis](#)





## Events

Whether it's keeping up with trends or discussing some other topic, our firm is dedicated to providing sound information to our clients. Along the way, we like to have some fun, too. We'll be happy to add you to our guest list. [Click here to learn more about our upcoming events.](#)

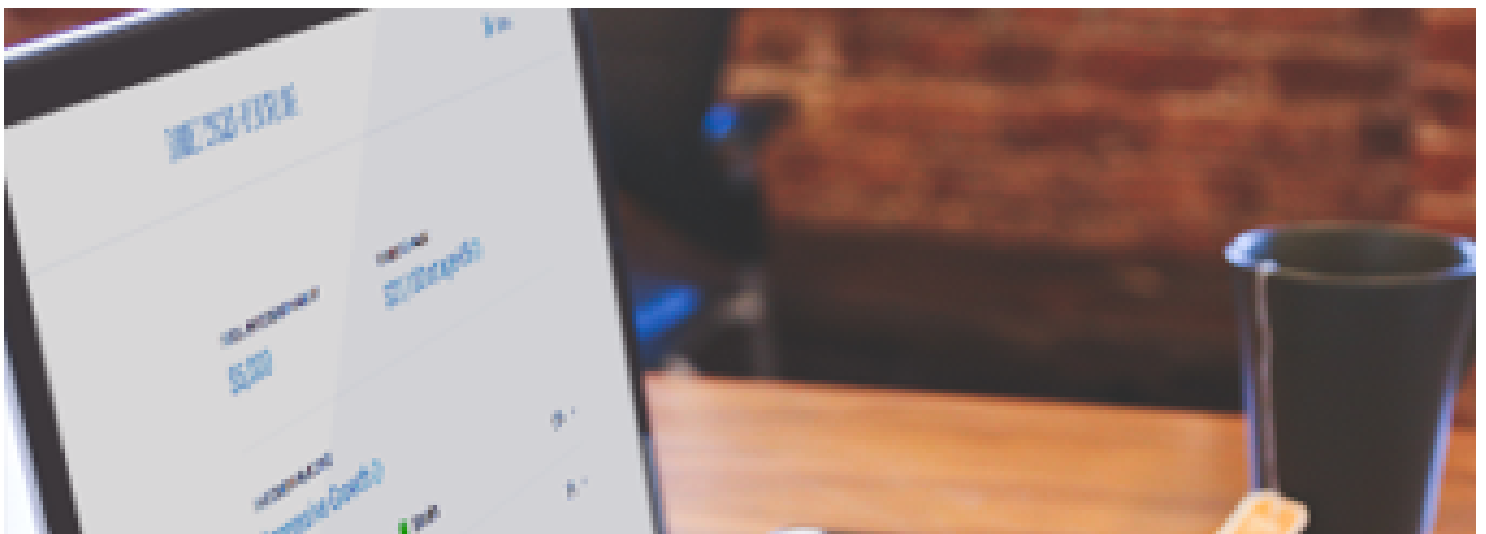
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## Cobalt Unlimited Team

Planning, advising, servicing...We are here for you. Get to know your Cobalt team.

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## Guided Wealth Portfolios

Convenient online investment management with personalized service and advice.

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# Weekly Market Commentary

Interested in how the market is performing? Here's a synopsis and our point of view.

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