



About Opal

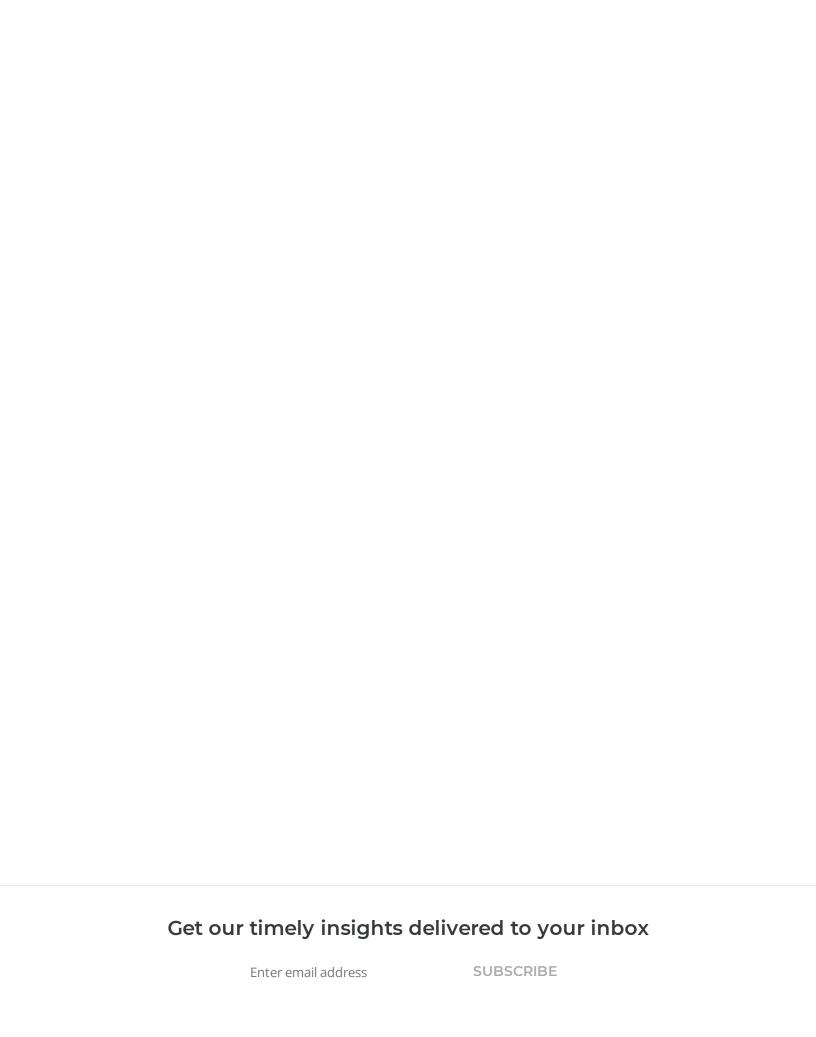
# Live was hife of financial freedom, joy and abundance.

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#### HOMEPAGE

#### **ABOUT**

About Opal
Why We're Different
Our Team
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#### **APPROACH**

Being Our Client
Opal Essence Process
Investment Process

#### **SERVICES**

Financial Planning
Investment Management
Estate Planning
Tax Planning
Business Planning
Performance Coaching

### **EXPERTISE**

Retirement Plans

Business Owners & Entrepreneurs

Individual Investors

Professional Athletes

Entertainment Industry Professionals

#### **INSIGHTS**

Market Commentary
Market Updates
Blog
In the News
White Papers
Videos
Favorite Books

#### **TOOLS**

Wealth Building Assessment
Portfolio Risk Analysis
Portfolio Stress Testing

**Business Valuation Tool** 

#### **EVENTS**

Exclusive Client Events
Seminars & Workshops
Book Opal Speakers
Past Event Videos

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