We spent years managing investments so large firms could grow and prosper. Then we built a firm so you can do the same.

Navalign is an independent financial company built from the ground up, with a focus on helping you navigate financial decisions that are aligned with your best interest. This holistic approach, combined with transparency and fiduciary ethics, creates the optimal base for your prosperity and financial peace of mind.

Not sure what to do?

Start Here

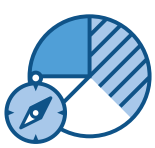
Let's get acquainted.

Schedule Meeting

We work hard to do right by our clients. Apparently when you do, word gets out.

We've created a package of wealth management services specially tailored for you to achieve your goals.

The way we see it, most financial goals are rarely your ultimate goals. More often they are the means to an end. As a fiduciary financial advisor, we work together to make sure your important life goals remain achievable and within reach.



Financial Planning

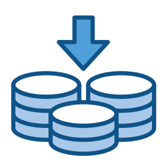
Prioritize your financial goals and understand how decisions you are considering today can impact your future.

Investment Services

Find the optimal balance in your portfolio of risk and reward to ensure the money you invest is working for you.

Retirement Strategies

Whether you're 25, 45 or 65, achieving financial independence and planning for retirement is just plain smart.



401(k) & Pension Plans

We setup and manage successful retirement benefit programs for businesses of all sizes.

Let's get started by finding the services best suited to your personal needs.

[Individual](#)

[Family](#)

[Business](#)

[Trusts](#)

We never lose sight of why we started in the first place, your success. And we do that with...

Fiduciary Advisors

In all situations we are fiduciary financial advisors, that means we have a legal obligation to act in your best interest and provide objective advice. We are advocates for helping you achieve your financial, and more importantly, your life goals.

Holistic Investment Philosophy

There is only one you, and your portfolio reflects that. Your investment plan is an important component of your financial plan. It's custom designed with a variety of low cost and tax efficient investments to help grow and preserve your wealth.

Fee-Only Structure

Our service model is 100% fee-only. This means our fees are transparent and we are never compensated by outside parties or through commissions. This helps to reduce conflicts of interest, so we remain clearly aligned with your goals.

Card image cap

How to Avoid Being the Bank of Mom and Dad

It's that time of year again, college graduation is upon us, and with schools on Summer break many empty-nesters will suddenly find themselves with not-so-empty nests...and, if they're not careful, empty wallets.

Card image cap

401(k) the Retirement Marathon

Today there is approximately $5.2 Trillion saved in 401(k) plans on behalf of more than 55 million active participants. Retirement plans established under Section 401(k) of the Internal Revenue Code, commonly referred to as "401(k) plans," have become one of the most popular types of employer-sponsored retirement plans.

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Coping With the Loss of a Loved One

Losing a loved one is a stressful transition. The added pressure of having to settle their estate and organize their finances can be overwhelming.

Let's talk. 855.360.1080 Email Us Setup a Meeting Join a Meeting

15910 Ventura Boulevard, Suite 1605

Encino, CA 91436

Financial planning and investment management services offered through Navalign, LLC a Registered Investment Adviser.