



## Wealth Planning

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Comprehensive wealth planning services for affluent individuals and families.

[Learn More \(/p/for-individuals\)](#)



## Institutional Services

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Consulting services for corporate businesses and non-profit institutions.

[Learn More \(/p/for-institutions\)](#)



## Portfolio Management

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Focused, active management through a disciplined investment strategy.

[Learn More \(/p/portfolio-management\)](#)

BrokerCheck<sup>®</sup> by FINRA

# Trusted Advisors Serving Individuals and Institutions

At NWK Group, we understand the market complexities today's investors face. Without objective guidance from a trusted advisor, it may be difficult to feel confident in your investment decisions. Since 2002, we have provided customized solutions and unbiased guidance to our clients with the goal of helping them navigate the complexities of the markets and address their financial concerns.

Based in San Francisco, we work with a diverse and select group of clients throughout the Bay area, including corporate and nonprofit institutions and affluent individuals and families. Our clients are not only diverse, but have unique needs. Offering comprehensive wealth planning, portfolio management, and institutional services, we develop customized portfolios and strategies that align with each client's individual objectives.

Through a rigorous investment management approach and a consultative process, we work closely with clients to not only create solutions, but to implement and monitor them on an ongoing basis. Contact us to learn more about how we can help you or your business pursue your financial goals.

[Contact Us \(/contact\)](/contact)

## Contact

Check the background of your financial professional on FINRA's [BrokerCheck](#)

NWK Group

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