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A Registered Investment Advisor Firm

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Helping You See Clearly Into Your Financial Future

We are a firm of experienced professionals who care like you do about your finances, your family, and your long-term success. It is our only objective to help you see and achieve the lifestyle and legacy that you dreamed of.



Services

We create strategies tailored to your goals.

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Why Choose Us

Independent Advice | Planning Expertise | Team Approach

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Our Clients

We work with those preparing for retirement, professionals, widows, divorcees, & children of our clients

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Meet Our Team



Melanie Tanaka, CFP®

Managing Director and Founding Partner



Ray Day, CFP®

Financial Advisor and Founding Partner



Ann Cooper, CFP®

Financial Advisor



Matthew Drehs, CRPC®
Financial Advisor



Donald Tanaka, OSJ
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