

CONTACT

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# Wealth Management

For Individuals, Families and Companies.

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# EXPERIENCED

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King Harbor is a boutique wealth management business. We are a Los Angeles based financial advisor with wealth management offices in Redondo Beach and Palos Verdes. Our principal has over 20 years of institutional investment experience.

We cater to those seeking a long-term relationship and who value expertise with a disciplined, conservative approach to investing.

## Reliable & Straightforward

We help you make sense of a complex financial world.

Trust

Process

We differ from many financial advisors in Los Angeles by offering our clients 20 years of institutional investment experience with an unblemished regulatory record.

[LEARN MORE](#)

We have a proven process to help you achieve financial success and security.

[LEARN MORE](#)

## OUR SERVICES

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### INVESTMENT MANAGEMENT

Helping you pursue your wealth management goals through careful advice and prudent risk management.



### RETIREMENT PLANNING

A personalized retirement plan that allows you to retire on your own terms.



### COLLEGE SAVINGS

We show you how to save for your children's or grandchildren's college education, while potentially saving on taxes.



## 401K RECOMMENDATIONS

We specialize in creating well-diversified, low-cost portfolios that help you meet your retirement needs.



## ESTATE PLANNING

Our extended team of estate and tax attorneys navigate the complex maze of estate planning to ensure your wealth is preserved from one generation to the next.



## TAX PLANNING

We provide strategic tax planning advice for reducing taxes, charitable giving, gift planning, business succession, and other topics.



## WILLS, HEALTH PROXIES AND POWER OF ATTORNEY

An investment plan is not complete without designating a person to manage your affairs should you become incapacitated.

Let's talk about how  
we can help you  
achieve your  
long-term goals.

## CONTACT INFORMATION

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