



Personalized. Progressive. Financial Planning & Investment Management

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Our Expertise

We provide comprehensive financial planning and investment management services that help you align your personal values and goals with your financial decisions. We are your guide and support system for a balanced financial life and lasting legacy.

[Financial Planning »](#)
[Investment Management »](#)

Our Team

Our team is invested in your long term success. Every client works with a dedicated set of advisors that is supported by a talented group of individuals in leadership and operations.

[Meet Our Team »](#)

About Our Firm

Since 2005 we've helped our clients protect and grow their assets and accomplish their goals. That's because we've emphasized personal relationships, with a deep commitment to sustainability and socially responsible communities that sets us apart from other advisory firms.

[Our Story »](#)



Thinking Fast, and Slow

FOMO is the new version of greed, and it has developed amazing velocity in our hyper-connected world of hyper-productivity. No matter your generation, we all have a hard time turning away from notifications on our phone. New information feels shiny and exciting, and we feel we have to act on it.

Our latest market commentary explores how FOMO and instinctive thinking are affecting our financial markets and how 'remembering

to think slow' leads to more deliberate decision making.

[Read Article »](#)

Q1 2019 Client Conference Call

[Listen Now](#)



Events



SATURDAY, JULY 20 - 4 - 7 P.M.

Art Walk on Solano

Stop by our office gallery on **Saturday, July 20** between 4 and 7 p.m. See our latest exhibit, "Glimpse" featuring the work of local artists Lara Hoke, Ned Axthelm, and Elena Zolotnitsky. Continue your journey and stroll the Avenue to discover great art, eat tasty bites, and hear live music. Over 25 businesses up and down Solano Avenue in Berkeley and Albany.

[Learn More about the event »](#)

News



Kate Campbell King and Brian Kozel honored by the Berkeley High School Development Group

On behalf of North Berkeley Investment Partners, Kate Campbell King and Brian Kozel were presented with an award in recognition to our firm's ongoing commitment to our community and in particular, the work we are committed to in support of Berkeley High School.

[Read the Article »](#)

North Berkeley Investment Partners Honored as Best For Workers, Creating Most Positive Impact for



Employees

North Berkeley is recognized for creating the most positive impact for their workers based on an independent, comprehensive assessment administered by the nonprofit B Lab. We're proud to be an honoree again this year.

[Read the Article »](#)

Art at North Berkeley



APRIL 15 - JUNE 28, 2019

Portraits of Nature Selected work by Mary Shisler, Marie-Luise Klotz, and Marguerite Elliot

Mary Shisler, Marie-Luise Klutz, and Marguerite Elliot capture the character of the natural world through photography and sculpture. From a copse of winter trees, to the prehistoric leaves of the ginkgo tree, their intimate portraits of nature show us an complex and interconnected world.

[More about the exhibit »](#)

[Join us for the opening reception](#)

»

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