

At Optivest, our mission is simple: to guide our clients to a more secure and prosperous financial future. With deeprooted experience and disciplined vision, we'll provide the expertise you need to turn the success you've earned into the peace of mind you deserve.

LEARN MORE

DUR CLIENTS

e serve a limited number of financially-established families, primarily in South Orange County, California to elp them navigate the "what's next" in life. It's why each Optivest advisor is truly specialized in serving the sique needs of clients in differing life, wealth and family situations.



Entrepreneurs, Business Leaders & Retirees



Philanthropic Families



Individuals in Difficult
Transitions

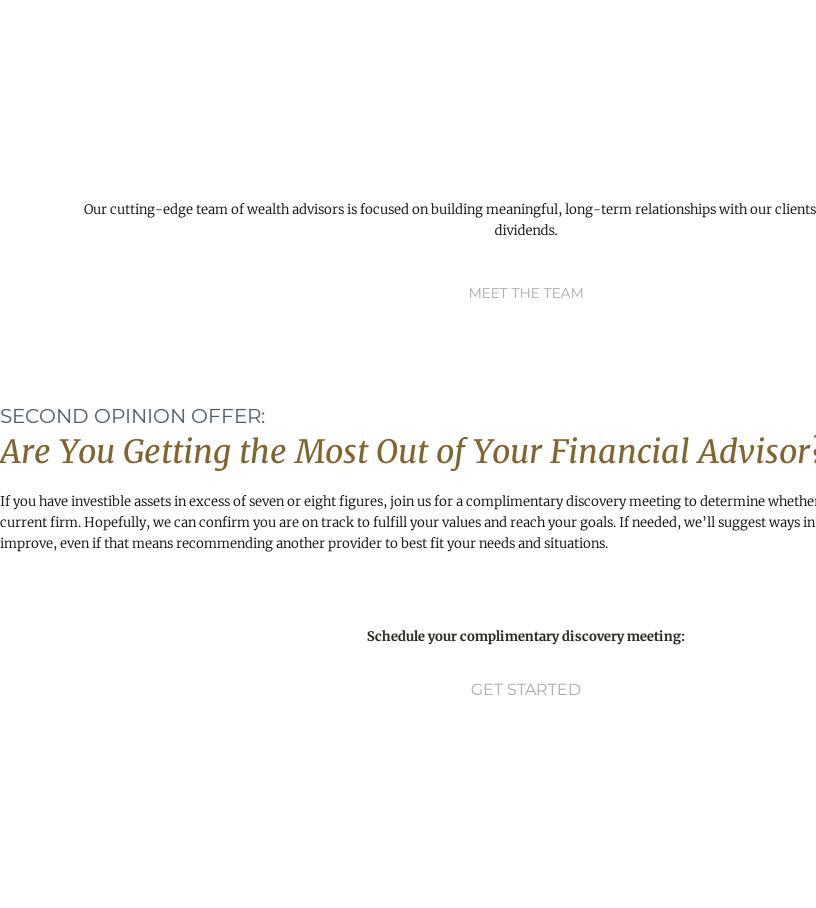
WEALTH MANAGEMENT DEFI

Our clients benefit from our team's clear and comprehensive vision of wealth management



Wealth Management = Investment Consulting + Advanced Planning + Relationship Man

HOW IT WORKS



DANA POINT, CA

VISIT US

Reach out to a member of our Client Services Team, to learn more or to **schedule a complimentary Discovery Meeting** where we'll explore your needs and aspirations for wealth, family and the causes you care about.

CONTACT US