

*At Optivest, our mission is simple: to guide our clients to a more secure and prosperous financial future. With deep-rooted 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](#)

OUR CLIENTS

We serve a limited number of financially-established families, primarily in South Orange County, California to help them navigate the “what’s next” in life. It’s why each Optivest advisor is truly specialized in serving the unique needs of clients in differing life, wealth and family situations.



Entrepreneurs, Business Leaders & Retirees



Philanthropic Families



Individuals in Difficult Transitions

WEALTH MANAGEMENT DEFINED

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

$$WM = IC + AP +$$


Wealth Management = Investment Consulting + Advanced Planning + Relationship Management

HOW IT WORKS

Our cutting-edge team of wealth advisors is focused on building meaningful, long-term relationships with our clients and their families. We help you maximize your dividends.

MEET THE TEAM

SECOND OPINION OFFER:

Are You Getting the Most Out of Your Financial Advisor?

If you have investible assets in excess of seven or eight figures, join us for a complimentary discovery meeting to determine whether your current firm is the best fit for you. Hopefully, we can confirm you are on track to fulfill your values and reach your goals. If needed, we'll suggest ways in which you can improve, even if that means recommending another provider to best fit your needs and situations.

Schedule your complimentary discovery meeting:

GET STARTED

LOCATED IN THE HEART OF

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