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Navalign Wealth Partners

Best Fiduciary Wealth Management Firm 2019 – Los Angeles

Their holistic approach combined with transparency and fiduciary ethics, creates the optimal base for prosperity and financial peace of mind. The team at Navalign Wealth Partners believe that financial advice should always be in the client's best interest. Find out why they are one of 2019's best fiduciary wealth management firms in Los Angeles.

Navalign is a fiduciary wealth management firm built from the ground up with a focus on helping clients navigate financial decisions that are aligned with their life goals. Navalign offers a simple and effective proposition: put clients first and deliver high-quality, honest financial advice.

As one of the top fiduciary wealth management firms in Los Angeles, Navalign specializes in working with business owners, executives and professionals in the entertainment, technology and healthcare industry. Navalign's team of award-winning wealth management professionals provide comprehensive financial planning and investment management services custom tailored to fit the unique needs of each client.

Navalign is committed to always act in the best interest of clients. Held to exceptionally high standards, the team at Navalign handles all situations with great care, trust and honesty. Being a fiduciary wealth management firm is a serious responsibility, it legally obligates the firm and its employees to avoid conflicts of interest and personal motives.

The business model at Navalign is a fee-only, not fee-based. This means Navalign's fees are completely transparent and they are only compensated directly by clients - never from outside parties, hidden fees or broker commissions. This is a major difference for investors to consider when selecting a wealth management firm. How a firm is paid goes a long way in understanding the depth of financial advice and services they provide.

When you become a client at Navalign, everything starts with getting to know you personally; your family, values and life goals. Through the financial planning process, Navalign works to organize and analyse your current financial situation. Only then can they create a tailored, personalized plan that accounts for your entire financial life.

At Navalign, they believe it's best to work as a team to help clients make better financial decisions. They promote proactive communication and encourage working directly with other trusted advisors, including accountants, attorneys,



"...clients can rest assured that this company will be available to offer financial help for generations to come."

business managers and other key decision makers. Working together ensures client goals are clearly communicated and actions are coordinated.

Navalign blends modern technology with personal service to help clients make better financial decisions. In addition to working with clients locally in Encino, Sherman Oaks, Studio City and the Greater Los Angeles area, Navalign meets with clients virtually across the globe. From syncing accounts to a secure client dashboard, to scheduling online video meetings, Navalign uses technology to enhance the client-advisor experience.

The team at Navalign spans across multiple generations, as do their clients. They help families and businesses plan for their legacy, so it only makes sense to help other financial advisors and wealth managers too.

In addition to growing through client referrals, Navalign has been successful in providing support to retiring financial advisors - welcoming and taking great care of their clients. With business continuity plans already in place, clients can rest assured that Navalign will be here to help for generations to come.

Overall, the phenomenal success of Navalign comes from the team's fiduciary commitment and client focussed approach. Their continued dedication providing comprehensive and unbiased financial advice is what truly makes Navalign Wealth Partners one of the best fiduciary wealth management firms.

NAVALIGN
WEALTH PARTNERS

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