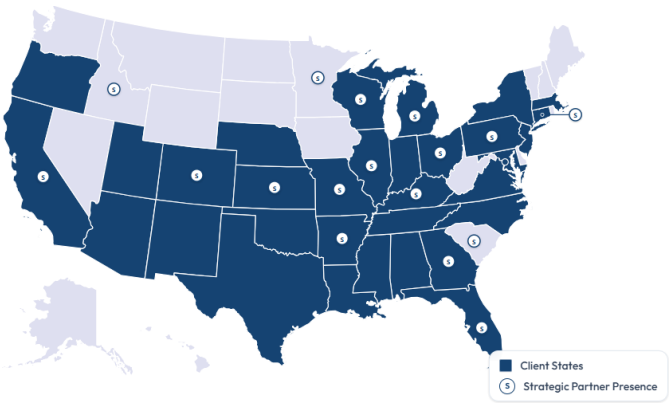
naviter wealth

Building and preserving your legacy

As partners, not just advisors





Built with purpose

Naviter is a wealth management firm specializing in serving a select group of affluent families, primarily those who have generated significant wealth through business sales. We provide access to comprehensive family office services to our clients nationwide. Our approach integrates investment management with key services such as tax, legal, trust, insurance, and lending.

The Naviter advantage

Acumen

Deep experience: 30+ years of advising complex relationships

Highly credentialed: Team includes CFAs, CFPs, and CPAs

Integrated services: Holistic advice, including tax, legal, insurance, and trust

Access

Sophisticated assets: Private equity, credit, and real estate

Tax-aware portfolios: Direct indexing with tax-loss harvesting

Advanced technology: Best-in-class performance reporting software

Integrity

Fiduciary only: Always acting in your best interest

Fully transparent: Clear fee structure that aligns with clients

Aligned interests: The team invests in the same strategies as clients

Follow us

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