



Harmon has been providing financial advice to high net worth individuals, families, entrepreneurs, and non-profit foundations since 1988. His clients receive comprehensive wealth management solutions, including portfolio construction, investment analysis, risk management, private equity research, wealth transfer and charitable giving. Harmon is passionate about developing long-lasting client relationships; his goal is to help people achieve prosperity with perspective, and pursue significance beyond monetary success. A dedicated husband, Harmon and his wife, Lea, love spending time with their children: Tyler, Haley, Troy and Kyle. Their family activities include camping, fishing, biking, karate, and baseball. Harmon is active in his community, volunteering at local organizations such as the Orange County Rescue Mission and Art4Kids. He also takes time to serve as a counselor at Saddleback Church in Lake Forest, California.