



OPTIVEST



Real Wealth

How Mark Van Mourick and the team at Optivest, Inc. are bringing back the "family office" for Orange County's wealthiest families

by **BETSY SANZ**


PHOTOGRAPHY by **ANTHONY HOLGUIN, RAYMOND PHOTOGRAPHY**

When Mark Van Mourick was a senior vice president at Smith Barney, he was responsible for the financial futures of no less than 1,200 investors and their families.

Yikes.

Mark is smart and hardworking (eight years after graduating from USC he reached the rank of SVP at Smith Barney and was their leading retail stock broker in Orange County), but ultimately he lived life by his conscience - and he knew he wasn't serving his clientele the way they needed to be served. Hard earned wealth, a family's peace and comfort, the opportunity to impact the world through giving; these are no small things. Mark had worked into a position to manage critical life investments for many families, and he began to believe that they warranted more than a phone call every once in a while and a monthly check for more or less than average.

Something else was possible. Mark looked at famously wealthy families and recognized that they not only had hard-hitting finance and investment managers for every phase of their careers, but knowledge-



Most new Optivest clients have built a successful business and they're looking to liquidate. I relish the opportunity to advise them before they pull the trigger on the sale. How will retirement look for them? What do they want from the rest of their life? What do they want for their family? When you're exiting your business, you typically need to upgrade your investment counsel. That's Optivest.

able advisors for every facet of their lives. It was "the family office," where the family's money was managed like a business, where every investment was customized to the particular priorities and concerns of the family, and where personal pursuits and interests were supported as seriously as business ventures. That's what Mark wanted to provide for his clients: a family office to advise every part of life.

So he made a leap from Smith Barney and he invited twelve of his clients to leap with him. The result was Optivest, a high-touch boutique investment firm founded on the premise that no two clients are the same, so neither should their portfolios be.

That was 25 years ago. Today, Optivest is what Mark intended it to be. Serving ultra high worth clients with a minimum of \$5 million investable cash, Mark and the Optivest team manage the investments of sixty individuals and families on a personal basis. Mark makes himself available to each one, working for (and delivering on) superior returns and low volatility through a strategic blend of securities, fixed income and real estate.

Many times, new Optivest clients are looking at retirement after having built businesses that have afforded them a degree of

wealth. They're exiting. It's the time when they're exploring how life after business might look.

"The end game is the fun part for me," says Mark. "Most new Optivest clients have built a successful business and they're looking to liquidate. I relish the opportunity to advise them before they pull the trigger on the sale. How will retirement look for them? What do they want from the rest of their life? What do they want for their family? When you're exiting your business, you typically need to upgrade your investment counsel. That's Optivest."

Mark's passion for exit strategy inspired him to form the Orange County Exit Planning Roundtable, a group of eight leading experts seasoned in the process of exiting a business, who have come together in a way that is unique in the nation. Their purpose is to help owners of midmarket businesses (\$20-\$200 million in annual sales) to build revenue, increase efficiencies and streamline negotiation

points prior to sale so they exit at the highest value possible. Through the process (which can take as long as a few years), the Roundtable acts as the coaching team, supporting and advising clients through every twist and turn, so that they land squarely on their feet at the beginning of a retirement that is planned, secure and expressive of their personal dreams.

And dreams are germane to the Optivest culture. Optivest is foundationally in the business of managing financial security for its clients; but when security is in place, Optivest is also there to support clients in pursuit of higher concerns. Optivest Client Services is dedicated to providing exclusive, personalized lifestyle services through their network of experts and luxury partnership alliances. As Mark says, they support clients in addressing those issues that either "keep them up at night" or "light them up in life." Is there a health concern that needs attention from the nation's best specialists? Do they need support in planning their child's college education? Is there a major purchase requiring negotiation help? Optivest is there to find solutions and quarterback experts at every level. But Optivest is also there to support clients in realizing their dreams, from event planning to art collection, from organizing vacations to finding tutors or trainers in any academic or sports pursuit and beyond. In short, Optivest is there to advise their clients in everything they care about.

In the development of the Orange County Exit Planning Roundtable and the growth of Client Services, Optivest represents the holistic approach to wealth management that Mark envisioned when he left Smith Barney all those years ago. It has truly become the family office. And it's as much his own family office as it is his clients'. Mark and his family are Optivest's fifth largest account. As Mark likes to say, he's eating his own cooking - he likes to invest alongside his clients, take the risks they take and share in their victories.

When Mark pursues his own higher concerns, he invites his clients to join him. Ten percent of gross revenue at Optivest goes into a foundation that distributes funds for charitable purposes. Several weeks out of the year sees Mark, with his wife of 31 years and their three children, overseas in personal distribution of those funds. They organize Optivest service trips, typically to developing countries, where money goes a long, long way. The Van Mouricks and the Optivest clientele have funded and personally helped build schools, orphanages, clinics, wells and more in many countries. This year they'll go to Haiti and Indonesia.

Mark Van Mourick and the team at Optivest understand that, ultimately, wealth is not about the amount of money you have, but the life you live. If you are considering exiting the business you've worked hard to build, or if you're looking for investment and lifestyle advisors who will provide personal attention, give Mark and the Optivest team a call.

Optivest, Inc. is located in Dana Point Harbor. Connect with them today by calling 949-363-8686 or email Mark Van Mourick directly at mark@optivestinc.com or visit www.optivestinc.com