

Next Play Wealth Launches to Help Clients Navigate Complex Financial Decisions Across Career and Life Transitions

New Portland-based advisory firm integrates financial planning, tax strategy, investment management, and 401(k) guidance for life's biggest transitions

PORTLAND, OR, UNITED STATES, June 30, 2026 /EINPresswire.com/ -- [Next Play Wealth](#), LLC, an



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Carlos Donat Arjona

independent wealth management and financial planning firm headquartered in Portland, today announced its launch, combining thoughtful financial planning, tax-aware investment management, and modern operational discipline to help individuals and families navigate major financial transitions with greater clarity, confidence, and control.

Founded by [Carlos Donat Arjona](#) and joined by Partner [Toby Martin](#), Next Play Wealth began serving clients in

early 2026. The firm was built on the belief that financial advice should adapt to life's changing circumstances, helping clients navigate career transitions, business events, retirement planning, concentrated equity positions, and evolving family goals with greater confidence and clarity.

In addition to broader financial planning services, Next Play Wealth works with clients to evaluate employer-sponsored retirement accounts, including 401(k) plans. The firm helps individuals review existing allocations, assess investment concentration and diversification considerations, and adjust investment strategies as career goals, family needs, and retirement timelines evolve.

"Many people don't need more financial noise, they need improved coordination between the different parts of their financial lives," said Donat Arjona. "Next Play's approach is centered on helping clients understand how short and long-term planning affect investment decisions, taxes, and risk management. Our goal is for clients to move forward with greater confidence and clarity."

"Clients often accumulate retirement accounts over years of career growth but rarely revisit whether those investments still reflect their current life stage, risk tolerance, or long-term goals," Donat Arjona added. "Part of our role is helping clients step back, look at their entire financial

picture and then evaluate those decisions thoughtfully, creating a more coordinated financial picture.”

Originally from Barcelona, Spain, Donat Arjona holds a Master’s degree in Finance from the University of Portland where he competed as a Division I collegiate tennis player. His background in athletics and finance helped shape the firm’s emphasis on preparation, discipline, and long-term thinking.

Martin joined the firm after more than two decades in technology leadership roles, including serving as CEO of Extensis, a Portland-area software company, up through its sale in late 2024. At Next Play Wealth, he oversees operations, client experience initiatives, and technology strategy.

“People too often make financial decisions while simultaneously managing demanding careers, family responsibilities, or major life changes,” said Martin. “We believe clients benefit from having a long-term planning partner who can help simplify complexity, communicate clearly, and use technology thoughtfully to create a more responsive client experience.”

The firm also plans to expand educational content and planning resources focused on retirement readiness, employer-sponsored retirement plans, equity compensation, and financial planning considerations for athletes and professionals experiencing rapid career growth.

About Next Play Wealth, LLC

Next Play Wealth, LLC is an Oregon-based registered investment adviser providing financial planning, tax planning, and investment advisory services to individuals and families. The firm works with clients across a range of life stages, including career transitions, retirement planning, business ownership, and multi-generational wealth transitions.

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