

# **Top 9 Best Financial Advisors in Los Angeles, CA | 2017 Ranking | LA Wealth Management Firms**

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## **2017 RANKING & REVIEWS TOP RANKING BEST FINANCIAL ADVISORS IN LOS ANGELES**

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### **Finding a Top Financial Advisor in Los Angeles, CA**

Once you've decided that you need the services of a wealth manager or financial advisor in Los Angeles, the next phase is to conduct research to identify the best advisors in the Los Angeles area that can meet your needs.

You may quickly realize that you are taking on quite a task if you do this research all by yourself. There is a lot of information out there when it comes to financial advisors in Los Angeles.

Whether you are looking for overall wealth management services, planning your retirement or transferring estates from one generation to another, there is at least one top ranking financial advisor in Los Angeles with the knowledge, expertise, and credentials to help you assess and meet your financial planning goals.

Questions you may have could include, "What general criteria should a good financial advisor in Los Angeles meet?" and "Why do I want to do business with a Los Angeles-based financial advisor who is independent or a fiduciary?" And of course, you'll have a lot of questions related to asset minimums and fee structure.

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### **Important Questions: Finding the Best Wealth Advisors in Los Angeles**

This is where AdvisoryHQ shines. AdvisoryHQ conducts extensive research to identify and rank the [best financial advisors and wealth management firms](#) across the US and the UK.

We then publish our objective ranking and reviews for anyone **to view for free**.

The advisory firms that make our list all have to live up to the stringent selection methodology and highly selective criteria that we have put in place.



*Award Emblem: Top 9 Best Financial Advisors in Los Angeles*

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## **AdvisoryHQ's List of the Top 9 Financial Advisors and Wealth Managers in Los Angeles**

*List is sorted alphabetically (click any of the names below to go directly to the detailed review section for that advisor)*

- [Abacus Wealth Partners](#)
- [ACap Asset Management](#)
- [AdvicePeriod](#)
- [Aspiriant](#)
- [HCR Wealth Advisors](#)
- [KCS Wealth Advisory](#)
- [L&S Advisors](#)
- [Miracle Mile Advisors](#)
- [Westmount Asset Management, LLC](#)

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## Top Financial Advisors and Wealth Managers in Los Angeles, CA | Brief Comparison

Financial Advisors in Los Angeles	Highlighted Features
Abacus Wealth Partners	Flexible Financial Planning
ACap Asset Management	Personalized Bookkeeping
AdvicePeriod	Focus on Strong Financial Planning
Aspiriant	Family Office Services
HCR Wealth Advisors	Comprehensive Life Planning Services
KCS Wealth Advisory	Financial Hub
L&S Advisors	Market Risk Pulse Indicator
Miracle Mile Advisors	Active Investment Approach
Westmount Asset Management	Context-driven approach to financial planning

*Table: Top 9 Best Financial Advisors in Los Angeles | Above list is sorted alphabetically*

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## AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services, and products that are ranked on its various top-rated lists?

Please click here "[AdvisoryHQ's Ranking Methodologies](#)" for a detailed review of AdvisoryHQ's selection methodologies for ranking top-rated credit cards, financial accounts, firms, products, and services.

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## Detailed—Top Ranking Financial Advisors in Los Angeles

Below, please find the detailed review of each firm on our list of the best financial planners in Los Angeles. We have highlighted some of the factors that allowed these Los Angeles wealth management firms to score so high in our selection ranking.

***See Also: [Best Financial Advisors in Des Moines, Ames & Davenport, IA | Ranking | Des Moines Area Wealth Managers](#)***

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## Abacus Wealth Partners Review

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[Abacus Wealth Partners](#) is an independent financial advisor with six locations in California (including one about twenty minutes from Los Angeles) and one in Pennsylvania. This Los Angeles wealth management firm serves clients all over the United States.

Abacus Wealth offers comprehensive wealth and investment management services to a variety of clients. This Los Angeles area financial advisors even offer “special planning” services for those who like to work on a project-by-project basis.

Abacus is a [fee-only](#) wealth management firm in the Los Angeles area.

## **Key Factors That Enabled This Firm To Rank as a Top Wealth Management Firm in Los Angeles**

### The Team That Cares

Taking a look at the team of dedicated financial advisors at Abacus Wealth, it's easy to see that it comprises well-rounded individuals who not only have the knowledge you need to make smart financial decisions, but also the hearts to guide you there with your best interest in mind.

Each member has a story of where they came from and what drives them today. It's worth a closer read if the character and personality of your Los Angeles–area financial advisor is important to you. You can find this information on the [team page](#).

### A Foundation of Independence

What drove the founders of Abacus Wealth to start their business in the first place is what continues to drive them today: the desire to stand as an independent financial advisor. What this means for you is that these Los Angeles area advisors don't give advice or make recommendations based on the sale of a product or the prospect of a commission. Their focus is solely on you and your needs.

### Flexible Financial Planning

Your financial advisors in the Los Angeles area can help clients create a flexible financial plan that can face all kinds of possible circumstances. A client may decide to move to another state, make a career change, start their own business, get audited by the IRS, buy a house, have kids, and more.

This Los Angeles–area wealth management firm will help clients draft a plan that covers the [six main areas](#) of financial planning:

- Impact
- Goals
- Money
- Safety
- Taxes
- Death



## Abacus Rainbow Portfolio

### Upgrade from Black and White to Color

#### Typical Portfolio

- U.S. Large Stocks
- International Large Stocks
- U.S. Bonds



### Abacus Rainbow Portfolio®

- U.S. Sustainable Stocks
- U.S. Small Value Stocks
- International Sustainable Stocks
- International Small Value Stocks
- Emerging Markets Stocks
- Real Estate
- U.S. Bonds
- Global Bonds
- Inflation Protected Bonds
- Mortgage Bonds



The Rainbow Portfolio® is a guideline for informational purposes only and should not be considered personalized investment advice.

If a picture says a thousand words, this one is definitely included because it describes Abacus Wealth's Rainbow Portfolio available for do-it-yourself investors. This Los Angeles–area wealth management firm believes in reaching beyond basic US and national large stocks and diving into a “rainbow” of options to fulfill your investment goals.

***[Don't Miss: Best Financial Advisors in Chicago, IL | Ranking | Chicago Wealth Management Firms](#)***

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## **ACap Asset Management Review**

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[ACap Asset Management](#) is a fiduciary wealth management firm in Los Angeles. Their team of Los Angeles–based financial advisors are committed to providing the highest standard of diligent and individualized service. This firm serves medical professionals, emerging physicians, business owners, and more.

The specific services offered by this Los Angeles wealth management firm includes everything from portfolio design and management to college and education planning.

ACap Asset Management is a [fee-only](#) wealth management firm in Los Angeles.

### **Key Factors That Enabled This Firm To Rank as a Top Wealth Management Firm in Los Angeles**

#### Socially Responsible Investing

Investing provides individuals with the opportunity to earn passive income. Essentially, you're making money while you aren't working by parking your money in companies you think are destined for success. But for some investors, that kind of opportunity comes with added responsibility—the responsibility to invest in companies that are aligned with their values.

ACap Asset Management is a Los Angeles financial advisory firm that offers socially responsible investing as a service. Clients who wish to use their wealth and investment strategy to make a positive contribution to their communities and the world at large can work with these financial advisors in Los Angeles to come up with a plan that does just that while also growing their wealth.

While working with this Los Angeles wealth management firm, clients can benefit from a portfolio that is designed with their core values in mind.

## Insurance Review

As a fee-only wealth management firm in Los Angeles, ACap Asset Management does not sell any products like insurance. But insurance can be a vital part of protecting your wealth, and while you do not want someone pushing a product on you, you'd still like to know whether it is valuable for your circumstances.

These Los Angeles financial advisors help clients evaluate the insurance products that may be useful to them with the help of pre-screened insurance agents. ACap [does not accept any referral fees](#) from these referral partners.

## Personalized Bookkeeping

Some people want more than their big money matters to be handled by a professional. Some want every little thing—down to their bills and small-scale accounting—to be totally outsourced. ACap Asset Management offers [personalized bookkeeping](#). This Los Angeles wealth management firm will monitor a client's income and expenses, reconcile bank and credit card statements, and prepare detailed reports for the client's tax preparer.

***[Related: Best Financial Advisors in Houston, TX | Ranking | Houston Wealth Management Firms](#)***

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# AdvicePeriod Review

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At [AdvicePeriod](#), they do exactly what the name says. With more than 20 years of industry-breaking experience, there is no skirting around the issues here. AdvicePeriod has set out to reinvent the concept of wealth management.

Whether you need guidance on retirement, income taxes, investment, or anything under the sun, AdvicePeriod can be there to provide you with the answers you need.

Located right in Los Angeles, California, AdvicePeriod serves high-net-worth families and individuals looking to make a lasting impact with their assets that can be passed down to future generations.



AdvicePeriod does not explicitly say whether it is a fee-only or fee-based wealth management firm in Los Angeles. That said, they do describe their [compensation structure](#) in some detail on their website with emphasis placed on their lack of tolerance for conflicts of interest.



## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles**

### Fiduciary Financial Advisors

Leading the industry standards from the very beginning, AdvicePeriod stands as a true fiduciary. This Los Angeles wealth management firm describes itself as a pioneer in the world of wealth management. Many of the approaches they championed in their early years of wealth management have now been adopted as best practices across the industry. Its team of financial advisors in Los Angeles holds itself to a standard of conduct which is centered on trust and the best interests of the client.

### Fee Transparency

As we mentioned in the introduction, AdvicePeriod does not explicitly say that they are fee-only or fee-based. They do, however, provide an explanation of their [fee schedule](#) on their website. AdvicePeriod believes that paying too much in investment fees is one of the biggest deterrents from a successful, long-term relationship. For this reason, this Los Angeles wealth management

firm wants you to understand its fees up front and feel confident in where your money is going.

Additionally, this Los Angeles wealth management firm [does not earn fees](#) like "soft-dollars" from custodians and they do not sell anything, including insurance products or their own funds.

### Comprehensive Wealth Planning

AdvicePeriod believes that it offers a unique mix of services, and it hopes you'll see the difference in your first meeting. While its financial advising and wealth management models are varied and designed around the client, here's a peek at the [general services](#) you can expect from this Los Angeles wealth management firm:

- Trust and estate planning
- Cash flow management
- Retirement planning
- Portfolio tax minimization
- Philanthropic guidance
- Risk management

### Built for Planning

While many financial advisors in Los Angeles take a heavy approach to investment planning, AdvicePeriod goes the opposite way. It believes in reliance on financial planners that focuses on advising and planning. According to this Los Angeles wealth management firm, asset allocation is a vital part of your plan that is accessible to the general public. They spend more time building a proper foundation for your financial plan and understanding your needs and objectives.

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## **Aspiriant Review**

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[Aspiriant](#) is a wealth management firm in Los Angeles that goes the extra mile to distinguish itself from other firms in the City of Angels. They are focused on building a prestigious firm that attracts top talent, cultivating the workplace

culture that encourages great employees to stay, perfecting the client experience, and doing everything they can to eliminate conflicts of interest.

Aspiriant is a [fee-only](#) wealth management firm in Los Angeles.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles**

### Individualized Services

Aspiriant provides an immense range of services that can be separated into three boxes. As this Los Angeles wealth management firm puts it, "You won't fit neatly into any of these three boxes."

The blend of services you receive from these three different categories—Investing, Investing & Wealth Planning, and Family Office Services—is totally determined by the client so that they can receive the exact services they need and find specific solutions without wasting their time.

### Investing & Wealth Planning

Aspiriant is a wealth management firm in Los Angeles that understands wealth is not the end—it's the means. It's the way that you go about doing what you want with your life. Getting to the point where you can fulfill certain dreams without jeopardizing your security requires a decent amount of planning.

It also requires guidance. It isn't easy to dig through your wayward dreams to identify exactly what you want. A financial advisor in Los Angeles can help you focus your goals and craft a strategy that allows you to work purposefully and diligently toward that early retirement, that loan-free education for your children, or that trip around the world.

The advisors at this Los Angeles wealth management firm will help you answer questions like:

- Is it financially feasible for me to leave my lucrative career and pursue my passions?
- If I live past 100 will I have enough income to live on?
- How can I mitigate my tax losses?
- How should I organize my estate and how should I transfer my wealth to the next generation?

## Family Office Planning

Obtaining family office planning services is like hiring a chief financial officer for your family. They can help organize your wealth, help you set up proper governance structures, and streamlines tasks that were once extremely complex.

This wealth management firm in Los Angeles can help with the following family-related [financial tasks](#):

- **Buying a house:** Getting the mortgage, weighing insurance options
- **Remodeling a home:** Running the project, managing the renovation expenses, finding insurance, and monitoring cash flow
- **Prepping children for college:** Training them to manage a portion of their own investment portfolio, teaching them to maintain a checkbook, and helping them select health insurance
- **Philanthropic planning:** Help align a client's giving with their values, choose between a simple structure or private foundation

***Popular Article: [Top Financial Advisors in Denver, Colorado Springs, & Boulder, CO | Ranking | Denver, Colorado Springs, & Boulder Wealth Managers](#)***

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## HCR Wealth Advisors Review

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[HCR Wealth Advisor](#) stands with more than 25 years of real-world experience and offers much more than financial planning and wealth management services. It also specializes in business consulting and insurance services.

Its small but highly skilled team of independent financial advisors remains fully engaged in your process and wants to empower you to make risk-controlled financial decisions that will help you get to where you're going.

HCR Wealth Advisors does not explicitly say whether they are fee-only or fee-based wealth management firm in Los Angeles. In their section "Why We're

Different" they explain that they do not sell to clients, accept commission from mutual fund companies or money managers, and show their clients all the options.

We advise readers to always verify a firm's compensation structure before starting a working relationship with a financial advisor.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles**

### Service Through All Stages

The team at HCR Wealth knows that life doesn't stay the same. Both planned and unexpected change can necessitate prudent financial planning services, and your wealth management firm in Los Angeles and elsewhere needs to be able to help you through these changes.

The goal is to integrate financial targets, retirement, and your investments into one comprehensive plan. Here are some of the most common life changes that may affect your needs:

- Marriage
- Divorce
- Inheritance
- Retirement
- Loss of a loved one
- Selling a business
- Starting a business
- Sudden and significant influx of assets

### The Independent Way

Through its independent status, HCR Wealth has the freedom to serve the best interest of its clients at all times. These Los Angeles financial advisors show you ALL of your options, not just proprietary investment products that garner commissions. Its holistic advisory model keeps the client as the number one priority at all times.

### The 7-Step Planning Process

HCR Wealth has established a 7-Step Planning Process that is designed to systematically help you identify your objectives and assess how you will get

there. The plan by this Los Angeles wealth management firm also includes careful monitoring of your plan and adjustment as your life evolves.



### A Variety of Services

HCR Wealth is a financial advisory firm in Los Angeles that offers many services. At first glance, it can seem like quite a bit, but rest assured that your advising team will customize these services based on your financial goals.

### **Financial Services and Wealth Management:**

- Financial planning
- Investment management
- Estate planning strategies
- Retirement planning
- Charitable giving/philanthropy strategies
- Tax management strategies
- Multi-generational planning
- Active portfolio management
- Cash management & budgeting

## **Consulting:**

- Significant purchase planning
- Private equity strategies
- Real estate analysis
- Business management services
- Elder care
- Life transition counseling

## **Business Services:**

- 401(k) plans
- Executive benefit planning
- Deferred compensation planning
- Business enterprise/succession planning
- Stock options and deferred compensation
- Business valuation consulting

## **Insurance Services:**

- Insurance planning/group benefits
- Corporate risk management strategies
- Life insurance and annuities
- Long-term care
- Disability and loss of value coverage

***[Read More: Best Financial Advisors in San Francisco, Oakland, Corte Madera, CA | Ranking | San Francisco Area Wealth Managers](#)***

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# **KCS Wealth Advisory Review**

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With services aimed at individuals, families, business owners, charitable foundations, and more, [KCS Wealth Advisory](#) has the big picture in mind. It operates on a set of strong core values and offers financial planning and investment management services that promote knowledge, clarity, and strength in everything that it does.

KCS does not describe itself as either a fee-only or fee-based wealth management firm in Los Angeles. We assume they are fee-based because they [explain on their site](#) that they offer "hourly, flat fee, or commission-based services" based on what the client prefers.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles**

### Core Philosophies

KCS Wealth does business around a set of core values and philosophies that embody the principles that this Los Angeles wealth management firm believes in. As you weigh your options, take these [core values](#) into consideration:

- **Puts clients first:** Putting you first seems simple, but you'd be surprised by how often relationships are clouded by third-party influences. KCS Wealth stands behind you 100% by adhering to a strict fiduciary standard that requires honesty and trust.
- **Your primary healthcare provider:** The similarities between healthcare and wealthcare are striking. It takes a team to manage both health and wealth, which is why this Los Angeles financial advisory firm works closely with all of your financial consultants to coordinate your financial life.
- **Transparent:** KCS Wealth believes that you should know exactly what you're paying for. For this reason, it charges a fee which is usually based on a percentage of assets under management. While this "all-in" approach is preferred by most clients, it also offers hourly, flat fee, and commission-based rates if you prefer.
- **Keeps costs down:** While managing your advisory accounts, KCS Wealth never receives compensation for the sale of a specific product. Being paid for completing a transaction on your behalf misaligns with the interests of the firm, and it chooses not to go this route.
- **Minimizes taxes:** While paying taxes is a commonly shared duty, you shouldn't get stuck paying more than you have to. KCS Wealth works diligently to reduce your tax liability at every stage.

### There's a Service for You



Instead of offering services to a select group of investors, the team at KCS Wealth offers services to just about all types of clients. Whether you are an individual looking for a financial advisor in Los Angeles or a corporation needing to establish better retirement services, KCS Wealth has you covered in all phases of your plan.

### Your Financial Hub

KCS Wealth wants to be the “hub” of your financial life. Not only is this Los Angeles wealth management firm able to offer you sound consulting services during all stages of your plan, but it can also work closely with other tax professionals to keep your entire process in one place. It works closely with each one of your professionals to achieve the following:

- Buying vs. renting/leasing a residence or automobile
- Evaluating the most effective way to navigate significant debt and/or bankruptcy
- Refinancing your home
- Performing a cost/benefit analysis of liquidating an insurance or annuity policy
- Deciding whether to use loans or liquid assets to fund college or graduate school
- Meeting with you and your attorney to manage your estate plan
- Referrals to other advisors & experts

***Related: [Best Investment Companies](#) | [Ranking](#) | [Top Investment Firms to Maximize Your Investment Strategies](#)***

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## **L&S Advisors Review**

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[L&S Advisors](#) provides investment services to families, individuals, advisors, and institutions with the main goal being to protect you from negative market loss and to facilitate steady portfolio growth. It has more than 30 years of experience, so it has seen the market at its best and its worst and can provide level-headed advice under various financial conditions.

L&S Advisors is a [fee-only](#) wealth management firm in Los Angeles.

# Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles

## An Independent, Fee-Only RIA

Combining the best of all three, L&S Advisors proudly stands as an independent entity. This Los Angeles wealth management firm is a Registered Investment Advisor, meaning that it has no affiliation with other institutions that have products to sell. Along with its fee-only approach, you can trust that L&S Advisors will offer honest and unbiased advices to its clients.

## An Investor's Advantage

When you get on board with L&S Advisors, you can take advantage of expertly curated approaches that stand to maximize your return and protect you from unnecessary risk. Strategies remain agile, active, and unconstrained as they help you navigate the market.

These are the few of the [investing strategies](#) available to you when you work with this wealth management firm in Los Angeles:

- **Tactical equity opportunities:** This strategy seeks to grow through capital appreciation, mainly by way of tactical and unconstrained investments in risk-controlled equities. This approach consists of a blended use of about 30 to 40 growth stocks, with a primary focus on US large-cap equities.

Clients may choose between 2 versions of this plan: one that utilizes MLPs (master limited partnerships) and one which avoids them altogether. For clients with accounts using a WRAP platform, this same plan is offered with slight alterations to the types of focused stocks.

- **Tactical equity income:** With the utilization of this strategy, income is sought through yield and capital appreciation, primarily from tactical and unconstrained risk-appropriate equities.

This blend of 30 to 40 dividend-paying stocks and/or alternatives is based on US large-cap equities, but foreign securities are also an option. This plan also offers an alternate version for clients using a WRAP platform.

- **Tactical equity ETF:** This strategy seeks growth through capital appreciation from tactical investment in risk-appropriate ETFs. Managing capital in riskier markets such as this requires the ability to move between equities and up to 100% cash. This strategy consists of 8 to 10 concentrated positions with a focus on domestic equity exposure.
- **Customized strategies:** Although the same risk-controlling principles still apply in a custom investment portfolio, the objective of this strategy is to set investment goals based on the needs of the client. This route uses a variety of stock options such as ETFs, MLPs, and REITs.

### The L&S Market Risk Pulse Indicator

L&S Advisors has a handy tool available through its website called the [Market Risk Pulse Indicator](#). This tool measures overall market risk based on a rigorous analysis and data tracking of more than 100 economic data points. This Los Angeles wealth management firm makes its asset allocation decisions based on the status of their Market Risk Pulse Indicator.

### A 6-Step Investment Process

On the road to successful investing, L&S Advisors have put in place a [6-step process](#) which allows it to comprehensively apply a variety of strategies to each of its client's unique portfolios.

1. Research and data tracking
2. Proprietary quantitative risk analysis
3. Long/cash asset allocation
4. Cycle-based sector allocation
5. Individual security selection
6. Monitoring and tactical adjustments

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## Miracle Mile Advisors Review

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[Miracle Mile Advisors](#) is an SEC-registered financial advisor that provides sophisticated financial and investment planning to high-net-worth families, individuals, and businesses in the Los Angeles area. With more than 45 years

combined experience in serving the needs of its clients, it is one of the fastest-growing firms in the country.

Miracle Mile is a fee-based wealth management firm in Los Angeles.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles**

### An Independent Mindset

Miracle Mile Advisors has known for a long time that the traditional style of financial planning, which tends to be motivated by the sale of high-fee products, creates too many conflicts between the goals of traditional firms and those of the client.

For this reason, Miracle Advisors has taken an independent approach which maintains the best interest of the client at all times and never enters a situation with commission-based products or services in mind.

### An Active Investing Approach

Miracle Mile Advisors has established several investing processes to add significant value to your investments while minimizing your overall risk. The following is an overview of the key features of this Los Angeles wealth management firm's [approach](#).

- **Analyze:** Your team of financial advisors will first analyze your current portfolio through a holistic approach that looks at fees, performance, and risk. Through this analysis, it is able to pinpoint excessive fees that are eating into your returns as well as recommend a specific and customized allocation of your assets.
- **Implement:** Miracle Mile Advisors will select low cost, tax-efficient EFTs that include necessary asset classes to achieve optimal return on investments. Once your selections are in place, your portfolio will be managed proactively.
- **Monitor and grow:** With customized quarterly reports, you can see how your funds are performing in the market. Monthly custodial statements from Charles Schwab and TD Ameritrade further serve to provide you with essential insights to your portfolio. You will have the opportunity to meet with your financial advisor regularly to discuss any matters that are important to you.

- **Peace of mind:** Through capital preservation and monitoring of market conditions, this Los Angeles wealth management firm applies all principles of its investment philosophy in managing your portfolio. Liquid portfolios allow Miracle Mile to respond quickly before a small risk becomes a landmine.

### Customized Planning Services

Miracle Mile Advisors understands the value in creating a customized financial planning approach for its clients. No two plans can be exactly alike, and they certainly shouldn't. No matter what life throws at you, your team at Miracle Mile Advisors is ready to take action. This Los Angeles wealth management firm helps clients make financial plans that account for the following events and more:

- Retirement
- Births
- Injury or illness
- Education
  
- Marriage
- Divorce

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## **Westmount Asset Management, LLC Review**

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[Westmount Asset Management, LLC](#) is an investment advisory firm founded in 1990. While serving both institutional and private clients, this financial advisory firm in Los Angeles strives to blend sophisticated institutional asset management strategies with a broad scope of consulting and planning services.

The team at Westmount Asset Management currently manages [more than \\$2 billion](#) in assets for its clients.

Westmount Asset Management does not explicitly say on their site whether they are a fee-only or fee-based wealth management firm in Los Angeles, but they do state that they don't charge extra for [planning services](#).

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Los Angeles**

### Approach to Investing

Understanding a Los Angeles wealth management firm's approach to investing is vital to choosing whether or not you want to work with them. Westmount outlines its investment approach by describing the [four tenets](#) of its investment process:

1. Persistence pursuing lucrative investment opportunities and uncovering strategies and asset classes that add value to a client's portfolio
2. Disciplined but flexible approach that ensures a client's portfolio is grounded while still being able to benefit from lucrative opportunities
3. An open mind toward alternative investments
4. Focus on long-term investing

### Context Driven Approach to Financial Planning

Your financial plan is the context within which you can make so many other decisions related to investments and wealth management. This wealth management firm in Los Angeles can help clients figure out what their wants and needs are so that their financial plan is relevant to their lives.

The financial planning process involves:

1. Creating a financial roadmap
2. Provide answers to pressing questions from clients about evaluating social security and medicare options, creating a timeline in order to comfortably retire, and funding a child or grandchild's education
3. Provide clarity and organization to the wealth management process
4. Coordination with other financial experts and professionals to provide a comprehensive financial planning experience

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## **Conclusion—Top 9 Financial Advisors and Wealth Managers in Los Angeles, CA**

When you consider the criteria outlined by each firm, think about how the service appeals to you. Certain financial advisors in Los Angeles cater to a

more select group of high-net-worth or institutional clients, but many do business independently and are much more accessible.

Think about what questions you still have. Are you still unsure about fees? Are there too many investment options for you to wrap your head around? If you have more questions about a particular service or how a specific Los Angeles-based financial advisor works and how it can fit your needs, contact them to book a free consultation.

As you narrow down your choices, consider making a list of all your investable assets and also one that takes into account what you want to gain out of a relationship with a Los Angeles-based financial advisor. Take this along with you to your initial meeting and get starting making your money work for you.

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Image sources:

- <https://abacuswealth.com/financial-planning/#money>
- <https://abacuswealth.com/investment-management/>
- [http://www.usarvrentals.com/blog/wp-content/uploads/2016/05/LAcity-630101\\_960\\_720.jpg](http://www.usarvrentals.com/blog/wp-content/uploads/2016/05/LAcity-630101_960_720.jpg)
- <http://www.hcrwealth.com/>

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