# **Top 9 Financial Advisors and Wealth Managers in Los Angeles, California**

# 2016 RANKING OF TOP WEALTH ADVISORS IN LA

### 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 best meet your needs. However, 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?" Furthermore, you'll certainly find yourself asking questions about asset minimums and a whole lot more.

### 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 <u>to view</u> <u>for free</u>.

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 (more on that below).



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

- Abacus Wealth Partners
- Advice Period
- Alpha Analytics Investment Group
- HCR Wealth Advisors
- KCS Wealth Advisory
- L&S Advisors
- Miracle Mile Advisors
- The Glowacki Group, LLC
- Westmount Asset Management, LLC

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

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

(List is sorted alphabetically)

No.	Firm	Location
1	Abacus Wealth Partners	Los Angeles
2	AdvicePeriod	Los Angeles
3	Alpha Analytics	Los Angeles
4	HCR Wealth Advisors	Los Angeles
5	KCS Wealth Advisory	Los Angeles
6	L&S Advisors	Los Angeles
7	Miracle Mile Advisors	Los Angeles
8	The Glowacki Group	Los Angeles
9	Westmount Asset Management	Los Angeles

### Methodology | Financial Advisors – Los Angeles, California

What methodology did we use in selecting this list of best Los Angeles financial advisors and top wealth managers in California?

Using publicly available sources, we identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Los Angeles and surrounding areas.

We then applied AdvisoryHQ's Breakthrough Selection Methodology to identify the final list of top advisors that provide services to communities in and around Los Angeles, California.



### Detailed Review – Top Financial Advisors in Los Angeles, California

The following is a complete review of each of the top performing firms on our list. We have outlined the most relevant information for you in a simple, easy-to-read format.

### **Abacus Wealth Partners Review**

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Abacus Wealth Partners is an independent financial advisor with six locations in California (including Los Angeles) and one in Pennsylvania. However, it serves clients all over the United States.

Abacus Wealth offers comprehensive wealth and investment management services to a variety of clients. It even offers "special planning" services for those who like to work on a project-by-project basis.

#### What We Like About Abacus Wealth Partners

#### 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 he/she came from and what drives that person today. It's worth a closer read, and you can find this information on the team page.

#### A Foundation of Independence:

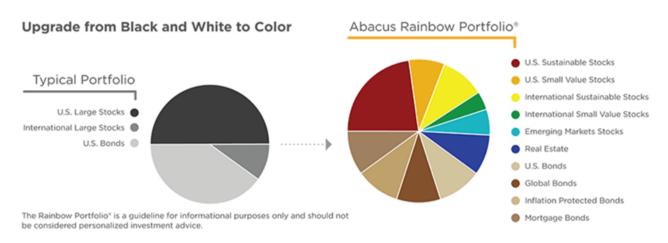
What drove the founders of Abacus Wealth to start their business in the first place is what still drives them today: the desire to stand as an independent financial advisor. What this means for you is that they don't give advice or make recommendations based on the sale of a product or a commission received from such. Their focus is solely on you and your needs.

#### A Sampling of Wealth Management Services:

Services offered through Abacus Wealth tend to divert from the mainstream just a little, so it's harder to pin them down. A few of the most common wealth management services offered include:

- The Planning to Make Work Optional plan: Consider this your modern day retirement plan. With this plan, your financial advisor will guide you through the process of making the last 10-40 years of your life the best yet.
- Estate planning: Helping you assess your goals for estate and trust services, Abacus Wealth takes into account the whole financial picture and makes recommendations based on your wishes while minimizing tax liability.
- Insurance planning: Abacus Wealth covers a wide range of insurance needs. These include determining the proper amount of life, auto, property, disability, earthquake, hurricane, umbrella liability, and long-term care insurance.
- Charitable and philanthropic giving: Keeping in stride with its philosophy on charitable giving, you'll find its team has the right mix of expertise and personal experience when it comes to philanthropic planning and charitable giving.
- Private real estate: Some clients have vast private real estate, and if this is you, Abacus Wealth extends its services to helping clients understand how to manage this unique type of wealth.

#### Abacus Rainbow Portfolio:



If a picture says a thousand words, this one is definitely included. It's easy to see what makes Abacus's investment portfolios superior to your typical portfolio offerings. It believes in reaching beyond basic US and national large stocks and diving into a "rainbow" of options to fulfill your investment goals.

#### Take the Quiz:

Want to learn about your financial archetype? Abacus Wealth offers a quick, 5-minute quiz that will help you assess your financial situation and tells you what your next financial step should be.

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# **Advice Period Review**

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At Advice Period, they do exactly what the name says. With over 20 years of industry breaking experience, there is no skirting around the issues here. Advice Period has set out to reinvent the concept of wealth management. Whether you need guidance on retirement, income taxes, investment or anything under the sun, Advice Period can be there to provide you with the answers you need.

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

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### <u>A True Fiduciary:</u>

Leading the industry standards from the very beginning, Advice Period stands as a true fiduciary. Its team of advisors holds itself to a standard of conduct which is centered on trust and the best interest of the client.

#### Total Fee Transparency:

Once you begin to take a closer look at the fees your financial advisor charges, you may be in for a surprise! Advice Period believes that paying too much in investment fees is one of the biggest deterrents from a successful, long-term relationship. For this reason, it wants you to understand its fees up front and feel confident in where your money is going.

Take a look at its fee schedule here.

Comprehensive Wealth Planning:

Advice Period 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 limitless and designed around the client, here's a peek at what services you might expect to see:

- 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, Advice Period does it exactly the opposite. It believes in reliance on financial planners that can first advise and then plan. According to Advice Period, there are too many investment managers trying to be advisors and not enough advisors who truly understand investments.

#### Advice Period's Private Trustee Board:

Sometimes, it's not what you know, it's who you know. In Advice Period's case, that extends to its Private Trustee Board: a select group of experienced individuals at the top of their profession. Advice Period collaborates with these experts to access the best information possible and translate that into valuable advice for you.

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### Alpha Analytics Investment Group Review

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Alpha Analytics is a Los Angeles-based financial advisor who specializes in investment management services for institutions and individuals with at least \$250,000 in investable assets. Its business is centered on a strong company philosophy which we will discuss below. When making your considerations, be sure to take a look at its dedicated team of financial advisors and what it brings to the table.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### An Accredited Team:

The small team of about 10 expert professionals at Alpha Analytics brings with it decades of experience, CFA accreditations, and real-world financial experience. Company President Robert Gipson shares his 20+ years of tax experience while Managing Director Robert Kahn managed over \$1.9 billion dollars of assets in his previous career. The remainder of the team doesn't disappoint either, and you can learn about each individual's success and history on the team page.

#### A Registered Investment Advisor:

As a Registered Investment Advisor (RIA), Alpha Analytics receives revenue only from fees charged to clients. It remains independent through its promise to never give financial advice based on the sale of another product or by the commission gained through doing so.

#### Core Values:

Alpha Analytics stands behind what it considers as essential core values. Let's take a look at what drives the team at Alpha Analytics to perform at its best:

- Clients first
- Integrity, dignity, and respect
- Diversity of opinions
- Transparency and understandability
- Excellence
- Purity of purpose
- Make the world a better place

#### The Investment Process:

• Investment Policy Statement: The first consideration during the investment process is in understanding your goals in order to create

a portfolio that matches your needs, circumstances, and investment horizon.

- Top-down macroeconomic perspective: As the construction phase of your investment portfolio begins, Alpha Analytics takes a comprehensive look at your equity valuations, interest rates, unemployment, consumer sentiment, fixed-income valuations, and much more.
- Investment thesis development: With the development of an investment thesis comes the ability to over or under-weigh economic and industry sectors and geographic concentration to produce the most accurate and realistic portfolio possible.
- Investment security selection and portfolio construction: Mutual funds, ETFs, individual stocks and bonds, and alternative investments are all considerations made by your team at Alpha Analytics. Through this data, it is able to detect specific exposure and inclusions in AIG client portfolios.

#### Online Account Access:

Having access to your financial information whenever you need it is always a good benefit. Partnering with Charles Schwab to get the job done, Alpha Analytics provides its clients with an online client access point on its website at anytime they need it.

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## **HCR Wealth Advisors Review**

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HCR Wealth Advisor stands with over 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.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### 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. 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. It shows you ALL of your options, not just proprietary investment products that garner commissions. Its holistic advisory model keeps the client as the #1 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 also includes careful monitoring of your plan and adjustment as your life evolves. Have a look at the 7 steps: Lay it all out and determine exactly what you have. Establish goals and determine future objectives

Identify opportunities and build an "income and needs projection" to determine what you need now and in the future

Build a framework for the investment allocation which best suits you

Customize a private client online portal in order to provide 24/7 real-time access to assets, liabilities and net worth valuations

Review the investment strategy and track progress to ensure your goals are achieved

Closely monitor and analyze your portfolio's growth

Evaluate and adjust your plan as your life evolves

#### <u>A Variety of Services:</u>

5

When doing business with HCR Wealth, you have available to you a good variety of financial 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. Let's take a deeper look at what's available. For a look at ALL services, click here:

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 counselling

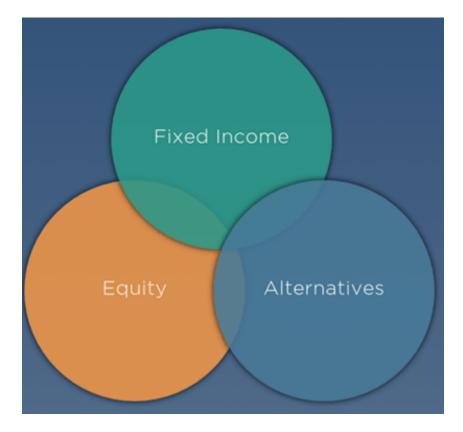
#### **Business Services:**

- 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

#### <u>3 Angles for Investment Planning:</u>



When taking advantage of HCR Wealth's investment services, you'll see that it begins every process by truly getting to know you and your investment needs. During the planning stages, it utilizes a variety of investment vehicles while controlling risk associated with each portfolio. For more information on investment planning, take a look here.

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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.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### Core Philosophies:

KCS Wealth does business around a set of core values and philosophies that embody the principles that it 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 wealthcare provider: The similarities between healthcare and wealthcare are striking. It takes a team to manage both health and wealth, which is why KCS 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 in 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 it 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

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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 over 30 years of experience, so it has seen the market at its best but also at its worst.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### An Independent, Fee-Only RIA:

Combining the best of all 3, L&S Advisors proudly stands as an independent entity. It 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. Let's take a look at what investing opportunities are available to you:

- 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 30-40 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 30-40 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 8-10 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 Risk Pulse Indicator:



L&S Advisors has a handy tool available through its website called the Risk Pulse Indicator. This tool measures overall market risk based on a rigorous analysis and data tracking of over 100 economic data points.

<u>A 6-Step Investment Process:</u>

On the road to successful investing, L&S Advisors have put in place a 6step process which allows it to comprehensively apply a variety of strategies to each of its client's unique portfolios. Here's a brief overview of these 6 steps:

- 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-networth families, individuals, and businesses in the Los Angeles area. With over 45 years combined experience in serving the needs of its clients, it is one of the fastest-growing firms in the country.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### 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 its plans:

- 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 important to you.
- Peace of mind: Risk management is Miracle Mile Advisors #1 priority. Through capital preservation and monitoring of market conditions, it 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.

For comprehensive investment information, go here.

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. The above image is a peek at its customized planning services.

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# The Glowacki Group, LLC Review

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The Glowacki Group, LLC is a financial advisor and wealth management firm with over 100 years of combined financial expertise. Its financial coaching and implementation strategies are a little bit different from the norm, but this just serves to further set it apart from peers.

As a true fiduciary, it does not receive commission revenue for the sale of any products and stands by its clients wholeheartedly. It serves both individuals and families through its Los Angeles-based office.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### The Capital Confidant Approach:

The Glowacki Group's Capital Confidant Approach was developed through decades of conversation with high-net-worth individuals, families, and business owners who found increasing complexities in their portfolios due to the unique circumstances associated with increased wealth. With this custom tailored approach, you can separate yourself from the onslaught of information overload and remain focused on the relevant details that truly affect your situation.

#### Total Wealth Management:

The Glowacki Group offers a custom suite of services to its clients. Each portfolio serves to reflect the unique needs of the client. Here is a sampling of The Glowacki Group's core services:



Portfolio Design 
& Management

Estate Planning 🕨

Strategic Tax Planning >

Risk Management 🕨

Philanthropic Planning & Coaching

Family Office Services >

### Disclosure 🕨

If you would like to view more specific information, you can do so right here.

The Value of Coaching:

Coaching is a professional discipline that provides established individuals and families a way to manage change and complexity. Through a mix of coaching and decision-making, clients experience a greater sense of confidence in relation to their wealth. Let's take a look at its 3 separate coaching services:

- Tactical Coaching: Tactical Coaching is like hiring someone to manage your financial life. If you want someone to help delegate your financial responsibility, this plan may be right for you. Tactical Coaching frees you from the question marks and, if you choose, can keep you accountable for your financial goals.
- Strategic Coaching: With Strategic Coaching, both your life assets and financial assets are inventoried and taken into consideration. This allows you to prioritize your financial goals. Your financial advisor will develop a written plan and proceed with implementation. You will receive coaching as your financial plan evolves.
- Vision Coaching: This approach to coaching helps to clarify your purpose. Whether you want to make a difference for your family, community or the world, Vision Coaching gets the conversation started. With the use of brainstorming, deep discovery, and documentation, The Glowacki Group helps to refine and expand your ambitions and paves the way for you to get there.

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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, it strives to blend sophisticated institutional asset management strategies with a broad scope of consulting and planning services.

The team at Westmount Asset Management serves with over <u>200</u> years of cumulative experience in its field, and it has been repeatedly named a top 100 advisory firm in the United States.

#### Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisor

#### A Compelling Investment Approach:

The team at Westmount Asset Management focuses on investment management through a select core of elements:

- Asset allocation and diversification: The primary goal of asset allocation is to create the right blend among various classes and strategies.
- Manager selection: Utilizing truly outstanding managers within each class allows the most comprehensive insight to be on your side.
- Active management: Through a system of monitoring, rebalancing, and extensive research, clients stand to improve their potential for higher returns.

#### Independent and Objective:

Westmount Asset Management is an independent, fee-only investment advisor that offers only objective, unbiased advice. It never associates with third-party institutions that seek to sell products and services on the sole premise of receiving a commission.

#### **Investment Services:**

Each client that comes through the door comes with his or her own unique set of circumstances and objectives. Let's look at how Westmount Asset Management approaches each portfolio:

- Developing an initial strategy: First, your team will work to evaluate your overall circumstances, needs, risk tolerances, and goals. It will analyze your current investment portfolio and then design an investment strategy customized to fit you. Once all the pieces are in place, your plan will be put into action.
- Ongoing management and communication: The implementation of your investment plan is just the beginning. Your portfolio is carefully monitored and rebalanced according to key market changes. Your financial manager will review and allocate your assets to ensure your success. Quarterly written reports and periodic meetings help you stay involved in the process.
- Access to private equity: Investing in the private equity market has long provided investors with valuable portfolio diversification. Through the application of venture capital, leveraged and managed

buyouts, and consolidations, investors have great potential to yield a high rate of return on their investments.

To assist both institutional and private clients, Westmount Asset Management has partnered with Westmount Capital Partners, L.P., ASEAN China Investment Fund, L.P. (ACIF), and ASEAN China Investment Fund II, L.P. (ACIF II), along with direct investments with private companies that specialize in private equity investing.

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

The reviews you've just finished reading about the top financial advisors and wealth managers in Los Angeles, California are a great starting point for your research.

When you consider the criteria outlined by each firm, think about how, if at all, 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 it!

Don't be afraid to get in touch; it's much less intimidating than you think. Several of the financial advisors on our list offer a free consultation or portfolio overview that can help you feel at ease about making a decision.

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. Along with any questions you have, bring your lists to your first meeting and feel confident that you will soon be seeing your hard-earned money start working hard for you. We hope you have found this "Top Financial Advisors and Wealth Managers in Los Angeles, California" article useful.

If you have questions, comments or tips about this article, click below to send us an email.

#### **Contact AdvisoryHQ**

We look forward to hearing from you. Cheers,

AdvisoryHQ Review Team