
Top 10 Best Financial Advisors & Wealth Management Firms in Los Angeles, CA | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN LOS ANGELES

Intro: 2018 Ranking of the Top Financial Advisors 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, retirement planning, 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.

If this is your first time working with a Los Angeles financial advisor, you likely have a lot of questions related to what separates a mediocre financial advisor from a top-rated Los Angeles financial planner.

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.

After applying our stringent selection methodology and highly selective criteria, we then publish our objective ranking and reviews for anyone **to view for free**.

Below, please find a detailed ranking of the top Los Angeles financial advisors and wealth managers for you to consider partnering with this year.



Award Emblem: Top 10 Best Financial Advisors in Los Angeles, CA

Top 10 Financial Advisors and Wealth Managers in Los Angeles, CA | Brief Comparison & Ranking

Best Financial Advisors in Los Angeles	Highlighted Features	Ratings
Abacus Wealth Partners	Flexible financial planning	5
ACap Asset Management	Boutique focus on physicians & medical professionals	5
AdvicePeriod	Focus on strong financial planning	5
Aspiriant	Family office, investing, & wealth planning services	5
Harris Financial Advisors	Expert financial planning services for women	5
HCR Wealth Advisors	Comprehensive life planning services	5

Miracle Mile Advisors	Active investment approach	5
Navigoe	Client-centric process	5
Westmount Asset Management	Context-driven approach to financial planning	5
L&S Advisors	6-step investing process & philosophy	3

Table: Top 10 Best Financial Advisors in Los Angeles | Above list is sorted by rating

Fee-Based vs Fee-Only Wealth Management Firms in Los Angeles

When it comes to evaluating financial advisors in Los Angeles, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Los Angeles financial advisor is right for you? Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-only and fee-based Los Angeles financial advisors.

Fee-Only

When an investment firm or a financial advisor in Los Angeles says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

In short, a fee-only financial planner in Los Angeles is in a better position to act solely in the interest of their clients.

Fee-Based

Fee-based firms will receive *some* direct compensation from clients but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based investment firms are also fiduciaries, which often counteracts the potential for conflict.

As a fiduciary, a Los Angeles financial planner is legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.

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.

Detailed Review—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.

Click any of the names below to go directly to the review section for that firm.

- **Abacus Wealth Partners**
- **ACap Asset Management**
- **AdvicePeriod**
- **Aspiriant**
- **Harris Financial Advisors**
- **HCR Wealth Advisors**
- **L&S Advisors**
- **Miracle Mile Advisors**
- **Navigoe**
- **Westmount Asset Management, LLC**

Click below for previous years' rankings:

- **2016 Review: Top 9 Best Financial Advisors in Los Angeles**
- **2017 Review: Top 9 Best Financial Advisors in Los Angeles**

Abacus Wealth Partners Review

[Abacus Wealth Partners](#) is an independent financial advisor with six locations in California, providing Los Angeles wealth management services from their office in Santa Monica.

As a top Los Angeles financial advisor, Abacus offers comprehensive wealth and investment management as a [fee-only](#) Los Angeles wealth management firm with a fiduciary commitment, serving clients across the United States.

Key Factors That Enabled Abacus Wealth Partners to Rank as One of the Top Los Angeles Financial Advisors

Caring Team

The [team](#) of dedicated Los Angeles financial advisors at Abacus is comprised of well-rounded individuals who not only have the knowledge to make smart financial decisions, but also the dedication to guide you 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 financial advisor is important to you.

Comprehensive Financial Planning

These financial advisors in Los Angeles area can help clients create a flexible financial plan that can face all kinds of possible circumstances.

For example, 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.

With Abacus Wealth Partners, your Los Angeles financial advisor will draft a plan that covers the six main areas of financial planning:

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



Best Financial Advisors in Los Angeles

Rating Summary

As an independent, fiduciary, and fee-only Los Angeles wealth management firm, Abacus provides a depth of value to their clients.

Not only can they tackle financial planning and investment management, but the firm also puts a strong focus on financial education, offering educational events, keynote speeches, free financial check-ups, and access to published research.

With a firm dedication to independence and a commitment to serving the best needs of their clients, Abacus Wealth Partners earns a 5-star rating as one of the best Los Angeles financial advisors.

See Also: [*Best Financial Advisors in San Francisco, Oakland, Corte Madera, CA*](#)

ACap Asset Management Review

[ACap Asset Management](#) is a fee-only wealth management firm in Los Angeles. Their team of Los Angeles financial advisors are committed to providing the highest standard of diligent and individualized financial services tailored to healthcare professionals.

Specific services for wealth management in Los Angeles include everything from portfolio design and management to college and education planning.

Key Factors That Enabled ACap Asset Management to Rank as One of the Top Los Angeles Financial Advisors

Socially Responsible Investing

For some investors, the opportunity to invest comes with added responsibility to support 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 create a financially and ethically sound portfolio, designed with their core values in mind.

Personalized Bookkeeping

Some people want more than their big money matters to be handled by a professional. Others want every little thing—down to their bills and small-scale accounting—to be totally outsourced.

For clients that prefer to outsource their financial paperwork, ACap Asset Management offers [personalized bookkeeping](#).

This top 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.

Rating Summary

For medical professionals or for those working in the medical industry, ACap provides incredibly competitive and valuable financial planning and investment management services.

The combination of a boutique focus and fee-only structure provides a solid, expert foundation for physicians and medical professionals, earning ACap Asset Management a full 5-star rating as a top Los Angeles financial advisor.

[Don't Miss: Top Financial Advisors and Best Wealth Managers in the US & UK | Top Ranking Lists](#)

AdvicePeriod Review

With more than 20 years of industry-breaking experience, [AdvicePeriod](#) has set out to reinvent the concept of Los Angeles wealth management.

Located 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 in the firm's [ADV](#), stating that "AdvicePeriod only receives compensation—in any form—from its clients," meaning that they are likely a fee-only financial advisor in Los Angeles.

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

Key Factors That Enabled AdvicePeriod 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, as 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.

Comprehensive Wealth Planning

While AdvicePeriod's 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



Top Financial Advisors in Los Angeles

Rating Summary

With a keen focus on building a proper foundation for each client's financial plan and a commitment to understanding unique needs and objectives, AdvicePeriod is one of the top financial advisors in Los Angeles.

It's also worth mentioning that new clients will find that their website is both welcoming and easy-to-navigate, with conversational and friendly explanations of their services, philosophies, and industry standards, solidifying the firm's 5-star rating.

[Related: Top Advisors and Wealth Managers in Ohio](#)

Aspiriant Review

[Aspiriant](#) is a [fee-only](#) wealth management firm in Los Angeles that goes the extra mile to distinguish itself from other Los Angeles financial advisors.

As a top financial advisor in Los Angeles, they are focused on attracting top talent, cultivating a strong workplace culture, perfecting the client experience, and eliminating conflicts of interest.

Key Factors That Enabled Aspiriant to Rank as One of the Top Financial Advisors in Los Angeles

Investing & Wealth Planning

Aspiriant is a financial planner in Los Angeles that understands wealth is not the end—it's the means. Fulfilling lifelong dreams without jeopardizing your security requires a decent amount of planning and guidance.

The Los Angeles financial advisors at Aspiriant 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 wealth management in Los Angeles advisors 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. The Los Angeles financial advisors at Aspiriant 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 includes 35 financial experts from a variety of industries to tackle situations like:

- 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: Aligning a client's giving with their values, choose between a simple structure or private foundation



Best Los Angeles Financial Planners

Rating Summary

Compared to other top-rated Los Angeles financial planners, Aspiriant stands out for their client-centric approach and their dedication to maximizing “[intellectual ferocity, loyalty, and passion.](#)”

The firm also maintains a unique sense of approachability, with down-to-earth explanations of their services and value propositions, making Aspiriant a great choice for clients who are hiring a Los Angeles financial advisor for the first time.

Popular Article: [Top Wealth Managers and Advisors in Florida](#)

Harris Financial Advisors Review

Founded in 1992, [Harris Financial Advisors](#) is an independent, fee-based wealth management firm serving Los Angeles clients from their Torrance, California location.

The firm specializes in providing expert planning services for family legacies, professionals in transition, and women in transition.

Although we prefer to rank fee-only advisors, we have included Harris Financial Advisors as a top Los Angeles financial planner due to their focus on transparency and fiduciary duty, as noted in the firm's [ADV](#).

Key Factors That Enabled Harris Financial Advisors to Rank as One of the Top Financial Advisors in Los Angeles

Financial Planning for Women

Compared to past generations, women today are accomplishing more than ever, earning higher salaries, advanced degrees, and even becoming household breadwinners.

As a top financial advisor in Los Angeles, Harris Financial Advisors aims to guide and support women through a multitude of financial challenges, including:

- Inheritance
- Retirement
- Loss of a loved one
- Career change
- Divorce
- Relocation

It's worth mentioning that this focus on providing expert financial services for women is no accident—the firm was founded by [Mary Harris, CFP®](#), who recognized the need for financial education and empowerment for women after her personal experiences as a single mother of two children.

Structured Financial Planning Process

At Harris Financial Advisors, one of their primary goals is to provide clients with the necessary structure and organization to accomplish their financial goals.

While partnering with this top wealth management firm in Los Angeles, clients can benefit from:

- Organization—Bringing order to your financial life

- Accountability—These Los Angeles financial advisors will help their clients follow through on financial commitments
- Objectivity—Helping clients avoid emotional decisions through a third-party point of view
- Proactivity—Anticipating transitions and providing financial preparedness
- Education—Providing clients with the knowledge they need to make smart decisions
- Partnership—Working alongside clients to accomplish goals



Top Wealth Management Firms in Los Angeles

Rating Summary

With a fiduciary commitment and a focus on providing financial clarity, Harris Financial Advisors is one of the best Los Angeles financial advisors to consider partnering with this year.

Their services for Women in Transition are particularly notable, making the firm an incredibly valuable resource for women in southern California and solidifying Harris Financial Advisors' 5-star rating.

Read More: [Best Financial Advisors in San Diego, California](#)

HCR Wealth Advisors Review

Founded in 1988, [HCR Wealth Advisors](#) brings 25 years of real-world experience, specializing in business consulting and insurance services along with financial planning and Los Angeles wealth management.

Its small but highly skilled team of independent Los Angeles financial advisors remains fully engaged in your process, empowering 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 financial planner in Los Angeles. They do, however, explain that they do not sell to clients or accept commission from mutual fund companies or money managers.

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

Key Factors That Enabled HCR Wealth Advisors to Rank as One of the Top Financial Advisors in Los Angeles

Service Through All Stages

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

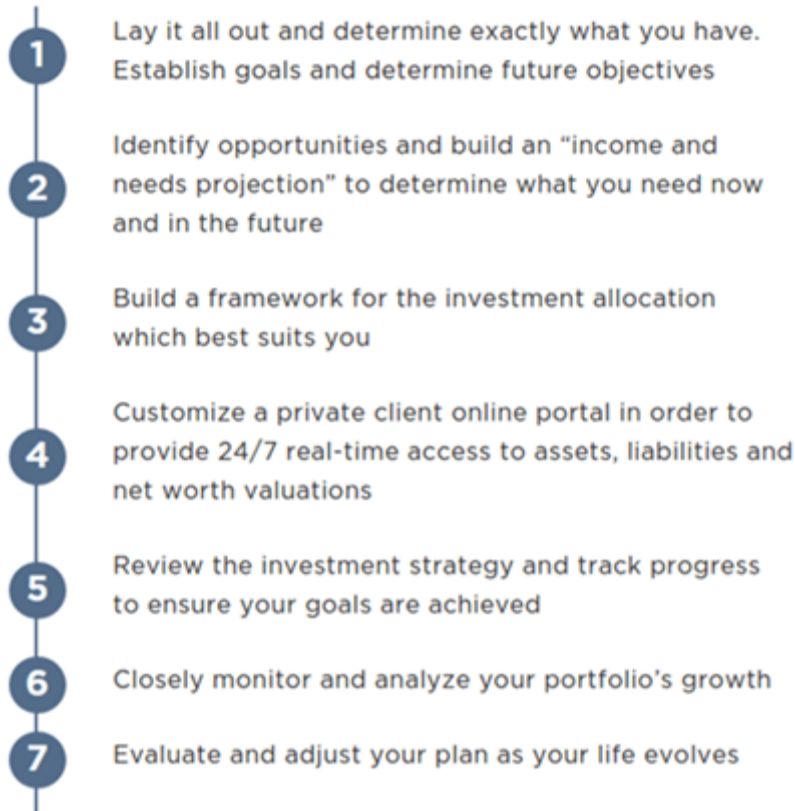
The goal is to integrate financial targets, retirement, and your investments into one comprehensive plan. Here are some of the most common life changes that may affect your needs:

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

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.

This Los Angeles wealth management firm also includes careful monitoring of your plan and adjustment as your needs and goals evolve, as shown in the image below.



Best Los Angeles Wealth Management Firms

A Variety of Services

HCR Wealth is a financial advisory firm in Los Angeles that offers many customizable services to help clients meet their financial goals. Under their Financial Services and Wealth Management division, HCR Wealth offers:

- Investment Management
- Estate Planning Strategies
- Charitable Giving/Philanthropy Strategies
- Retirement Planning
- Cash Flow Analysis
- Cash Management & Budgeting
- Financial Planning
- Tax Management Strategies
- Active Portfolio Management
- Asset Allocation Analysis
- Stock Options and Deferred Compensation
- Net Worth Assessments
- Multi-Generational Planning

Uniquely, these Los Angeles financial advisors also provide consulting, business, and insurance services, offering a deep range of value for a variety of client needs.

Rating Summary

For individuals that need comprehensive wealth and financial planning, HCR Wealth is a great option.

As a top Los Angeles financial advisor, they provide a wide variety of services, a comprehensive planning process, and a keen understanding of how life changes can impact financial health, earning the firm a 5-star rating overall.

[Related: Best Financial Advisors in Lexington & Louisville, Kentucky | Ranking | Kentucky Wealth Management Firms](#)

L&S Advisors Review

With over 30 years of experience, [L&S Advisors](#) provides investment services to families, individuals, advisors, and institutions, protecting clients from negative market loss and facilitating steady portfolio growth.

L&S Advisors is a [fee-only](#) wealth management firm in Los Angeles that focuses solely on investment management, rather than comprehensive financial planning.

Key Factors That Enabled L&S Advisors to Rank as One of the Top Financial Advisors in Los Angeles

An Investor's Advantage

When partnering with L&S Advisors, you can take advantage of expertly curated approaches that stand to maximize your return and protect you from unnecessary risk.

These are the few of the agile, active, and unconstrained [investing strategies](#) available to clients of 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 through a blended use of about 30 to 40 growth stocks, with a primary focus on US large-cap equities.

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.

Tactical Equity ETF

This strategy seeks growth through capital appreciation from tactical investment in risk-appropriate ETFs. 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.

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:

- Research and data tracking
- Proprietary quantitative risk analysis
- Long/cash asset allocation
- Cycle-based sector allocation
- Individual security selection
- Monitoring and tactical adjustments

Rating Summary

For those that want a trusted firm to implement expert investment strategies and portfolio allocation, L&S Advisors is a solid choice for wealth management in Los Angeles.

However, potential clients should be aware that L&S Advisors is solely an investment manager, meaning that they do not offer additional financial services like many of the other Los Angeles wealth management firms on our list, ultimately limiting the firm in comparison.

Those who need additional services outside of portfolio management—like budgeting, cash flow allocation, tax planning, or retirement planning—should consider using another Los Angeles financial planner instead.

[Don't Miss: Top Financial Advisors in Denver, Colorado Springs, and Boulder \(Colorado\)](#)

Miracle Mile Advisors Review

[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. They have been included in our ranking for their fiduciary commitment and comprehensive approach to both financial planning and investment management.

Key Factors That Enabled Miracle Mile Advisors to Rank as One of the Top Financial Advisors in Los Angeles

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, Miracle Mile Advisors can pinpoint excessive fees that are eating into your returns as well as recommend a specific and customized allocation of your assets.

Implement

Your Los Angeles financial advisors will select low cost, tax-efficient ETFs 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 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.

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

Rating Summary

Although the firm does adhere to a fee-based structure, Miracle Advisors takes an independent approach which maintains the best interest of the client and never enters a situation with commission-based products or services in mind.

With an independent mindset, customized planning services, and an active investing approach, Miracle Mile Advisors is one of the top financial advisors in Los Angeles to consider partnering with this year.

Popular Article: [*Top Best Financial Advisors in Pittsburgh, Pennsylvania*](#)

Navigoe Review

With roots tracing back to 1993 from its predecessor, Leonard Wealth Management, [Navigoe](#) brings over two decades of experience providing all-inclusive, conflict-free, fee-only wealth management.

As a true fiduciary, Navigoe strives to objectively help each client successfully navigate through choppy financial waters, no matter what challenges may arise.

Located south of Los Angeles in Redondo Beach, Navigoe provides expert financial planning services to clients across southern California.

Key Factors That Enabled Navigoe to Rank as One of the Top Financial Advisors in Los Angeles

Personalized, Client-Centric Process

For some potential clients, choosing a Los Angeles financial advisor may take a little extra time.

It's important to ensure that each client and their financial advisor in Los Angeles are on the same page, which is why Navigoe sets aside 3-5 meetings to cultivate an in-depth understanding of each client's financial goals and needs.

This client-centric introductory process includes:

- Introductory Meeting to Meet the Crew—Prospective clients can meet team members and learn more about Navigoe's financial services
- Discovery Meeting to Prepare for the Voyage—These Los Angeles financial advisors will learn about your values, interests, financial situation, concerns, and goals for the future
- Charting the Course—Detailed analysis and a recommended strategy for financial topics like retirement, investments, taxes, estate, college, and insurance
- Getting Ready to Set Sail—Prospective clients can take as much time as they need to decide whether Navigoe is the right fit for them

Fee-Only Pricing & Fiduciary Commitment

As a fee-only fiduciary, Navigoe represents the highest standards of ethics and business practices among Los Angeles financial advisors.

Their fee-only pricing structure ensures that clients receive wholly unbiased advice, free from conflicts of interest from commissions or referral income.

Additionally, as a fiduciary, the Los Angeles financial planners at Navigoe are legally bound to act in their clients' best interests at all times, solidifying trust and transparency between advisors and their clients.

To support these business practices, Navigoe maintains an active membership with professional organizations like:

- National Association of Personal Financial Advisors (NAPFA)
- Financial Planning Association (FPA)
- Fee-Only Network



Top Financial Advisors in Los Angeles

Rating Summary

While Navigoe may be smaller than other Los Angeles wealth management firms on our list, the firm provides a solid foundation of client-centric processes and practices, making them a competitive choice among Los Angeles financial advisors.

Along with a fiduciary commitment and a fee-only philosophy, Navigoe also brings decades of experience and four Certified Financial Planners, earning the firm a 5-star rating overall.

Westmount Asset Management, LLC Review

[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.

While the firm does not explicitly explain whether they are a fee-only or fee-based wealth management firm in Los Angeles, they do state that they operate underneath a fiduciary model, effectively eliminating commissions and conflicts of interest.

Key Factors That Enabled Westmount Asset Management, LLC to Rank as One of the Top Wealth Management Firms in Los Angeles

Approach to Investing

Understanding a Los Angeles wealth management firm's approach to investing is vital to choosing whether you want to work with them. Westmount outlines its investment approach by describing the [four tenets](#) of its investment process:

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

Westmount's financial planning process involves:

- Creating a financial roadmap
- Providing answers to questions about social security and Medicare options, creating a timeline in order to comfortably retire, and funding a child or grandchild's education
- Providing clarity and organization to the wealth management process
- Coordinating with other financial experts and professionals to provide a comprehensive financial planning experience



Best Los Angeles Wealth Management Firms

Rating Summary

As a top financial advisor in Los Angeles, Westmount provides their clients with a comprehensive, personalized, and expert financial management process.

Although the firm does not explicitly state their fee structure, according to their [ADV](#), each financial advisor does not receive economic benefits from any entity outside of the firm, meaning that Westmount is likely a fee-only Los Angeles financial advisory firm.

Conclusion—Top 10 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.

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 take 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 start making your money work for you.

Rate Table Disclaimer

Click here to read AdvisoryHQ's [disclaimer on the rate table\(s\) displayed](#) on this page.

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