
Top 11 Best Financial Advisors & Wealth Management Firms in Los Angeles, CA | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN LOS ANGELES

Intro: Ranking of 2019's Top Financial Advisors in Los Angeles, CA

When you get to a point in life and need the services of a wealth manager or financial advisor in Los Angeles, you don't want to just pick the first one that comes up in a Google search. Finding the best LA financial planner for your needs takes some dedication and in-depth research.

You'll find several key differences between the wealth management firms in Los Angeles, California, including the type of clientele they serve (high-net-worth, all income levels, retirees, etc.) or they specialize in some other client niches, and how their fees are handled.

Whether you're looking towards retirement planning, just starting out with investing, or want to make sure your assets can weather the rollercoaster of Wall Street, the choice you make in a wealth management partner can have a long-lasting impact on your financial future.

Learning the most you can about a potential financial advisor will help you make a more informed choice. However, doing all the legwork on the research yourself can take hours. That's why we've worked to make your search for the perfect financial advisor in Los Angeles easier.

AdvisoryHQ researches the best of the best every year and puts together comprehensive lists of the [top financial advisors and wealth management firms](#) in Los Angeles and other cities in the US and UK. We highlight reasons they've been chosen as top-rated wealth management firms, what makes each firm stand out, the type of clients they serve, and much more.

Have you been wondering who the best financial advisors in Los Angeles are? Below, you'll find a detailed review of each firm that's worth to consider partnering with this year.



Award Emblem: Top 11 Best Financial Advisors in Los Angeles, CA

Top 11 Financial Advisors and Wealth Managers in Los Angeles, CA | Brief Comparison & Ranking

Best Financial Advisors in Los Angeles	2019 Ratings
Abacus Wealth Partners	5
ACap Advisors & Accountants	5
AdvicePeriod	5
Aspiriant	5
EP Wealth Advisors	5
Harris Financial Advisors	5
HCR Wealth Advisors	5
Miracle Mile Advisors	5
Navigoe	5
Westmount Asset Management	5
L&S Advisors	3

Table: Top 11 Best Financial Advisors in Los Angeles | Above list is sorted by rating

What's the Difference Between Fee-Based and Fee-Only Financial Management Firms in Los Angeles?

When looking over fee arrangements for financial advisors in Los Angeles, you'll come across two main categories, one is "fee-only" and the other is "fee-based."

Unless you're familiar with those two terms, it can be confusing to know exactly what the difference is, but it's a very important distinction and one that could make all the difference in your choice of wealth management firm in Los Angeles, CA.

Fee-Only Financial Advisors

If an LA financial advisor says they are fee-only, that means that they are only paid by client fees and do not accept any commissions from third parties for selling or recommending financial products.

This adds an extra layer of trust in the financial advisor and client relationship because it minimizes any potential conflict of interest and frees them to fully act in the best interest of their clients.

If you're working with a fee-only financial planner in Los Angeles, you won't have to wonder if they're recommending a particular investment because of a potential commission.

Fee-Based Financial Advisors

Financial firms that are fee-based receive some of their compensation from client fees but also are free to accept third-party commissions from companies providing financial products.

Being fee-based can create a conflict of interest or at least that perception, which is why there are fee-based firms that are also fiduciaries, which helps balance their fee-based status.

A fiduciary Los Angeles financial planner is legally obligated to fully disclose any conflicts of interest, be completely transparent, and put the interests of their clients ahead of their own.

2019 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 2019 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 Advisors & Accountants](#)
- [AdvicePeriod](#)
- [Aspiriant](#)
- [EP Wealth Advisors](#)
- [Harris Financial Advisors](#)
- [HCR Wealth Advisors](#)
- [Miracle Mile Advisors](#)
- [Navigoe](#)
- [Westmount Asset Management, LLC](#)
- [L&S Advisors](#)

Click below for previous years' rankings:

- 2018 Review: [Top 10 Best Financial Advisors & Wealth Management Firms in Los Angeles, CA](#)
- 2017 Review: [Top 9 Best Financial Advisors in Los Angeles](#)
- 2016 Review: [Top 9 Best Financial Advisors in Los Angeles](#)

Abacus Wealth Partners Review

[Abacus Wealth Partners](#) began with a vision to be a catalyst for people to not simply get richer but to live a more fulfilling life. That vision has helped the company grow to seven locations in California and serve clients in 42 states, including the District of Columbia.

As a top-rated Los Angeles financial advisor, Abacus provides comprehensive wealth and investment management as a [fee-only](#) Los Angeles wealth management firm. This LA financial planner also has a fiduciary commitment to their clients.

They serve all types of financial needs, from clients needing help with budgeting for college or retirement savings to those with needs related to intergenerational wealth transfer, philanthropy or business ownership.

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



Top-Rated Financial Advisors in Los Angeles

Caring Team with Their Own Stories

Abacus is comprised of 31 financial advisors to handle all your financial planning needs, each well-rounded and committed to making the world a better place as part of this LA financial management company's team.

If you like to know the wealth manager that you're working with a bit better, then you'll like the fact that each member of this team of dedicated Los Angeles financial advisors has their own personal story and reason they decided to pursue a career in this area. You can read through them all on their website and get an up close and personal look at each advisor.

Comprehensive Financial Planning

Abacus believes that financial plans need to be flexible enough to handle many of life's expected and unexpected changes. This wealth management firm in Los Angeles uses a financial planning process that prioritizes a client's most important questions first - planning a roadmap to financial success.

Whether it's risks or opportunities, this LA financial advisory firm ensures your plan can evolve and is there to call on to quickly address changing financial situations.

Abacus Wealth Partners will draft a plan that covers the six main areas of financial planning:

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

Rating Summary

By being both an independent fiduciary and fee-only Los Angeles wealth management firm, Abacus provides trust and value to their clients.

They also go above and beyond financial planning and investment management by emphasizing financial education, offering educational events, keynote speeches, free financial check-ups, and access to published research. All of which empower their clients to learn more about factors that impact their financial future.

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

See Also: [Top Financial Advisors in Phoenix and Scottsdale, Arizona](#)

ACap Advisors & Accountants Review

[ACap Advisors & Accountants](#), a combination of ACap Asset Management, Inc. and ACap Accounting Services, Inc., was founded in 2009. This [fee-only](#) financial firm is a boutique wealth management firm in Los Angeles and a full-service accounting firm.

Their team of Los Angeles financial advisors is committed to providing unbiased and comprehensive financial guidance that is specifically tailored to those in the healthcare industry.

This independent firm believes in sound investment philosophy that doesn't speculate, but rather is focused on achieving a healthy rate of return for their clients.

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

Socially Responsible Investing

Some investors appreciate the opportunity to invest and better their community at the same time. ACap is a Los Angeles financial advisory firm that understands socially responsible investing and offers this 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 customized portfolio, designed with their core values in mind.

Personalized Bookkeeping & Payroll

Accounting is a big part of managing finances, and for those investors who would like some assistance in this area, this financial advisory firm in Los Angeles, CA can handle your bookkeeping for you.

ACap Advisors & Accountants can set up, manage, and maintain your QuickBooks Online file, handling all entries and monthly reconciliations for both your bank and credit card statements.

If you have employees on a payroll, this Los Angeles wealth management firm can also handle this area. Taking care of processing and tracking all relevant payroll data and submitting federal and state tax payments.



Best Los Angeles, CA Wealth Management Firms

Rating Summary

For medical professionals or for those working in the healthcare industry, ACap provides excellent value for both financial advisory services and accounting services. Their competitive rates and depth of services help clients save both time and money.

The combination of a boutique focus, fee-only structure, and commitment to serve their clients above all else, earn ACap Advisors & Accountants a full 5-star rating as a top Los Angeles financial advisor.

Don't Miss: [Best Financial Advisors in Boston, Massachusetts](#)

AdvicePeriod Review

With a team of “mavericks” and over 20 years of experience breaking the mold, [AdvicePeriod](#) has a history of pioneering the field of Los Angeles wealth management.

AdvicePeriod is located in Los Angeles with 26 advisors and 13 offices across 10 states. This LA financial advisory firm serves all levels of clients and has no minimum relationship requirement.

The firm does not explicitly say whether it is a fee-only or fee-based wealth management firm in Los Angeles, however, it is a fiduciary.

The firm describes their compensation structure in detail in the firm's [ADV](#), stating that "AdvicePeriod only receives compensation—in any form—from its clients," and that it is committed to minimizing potential conflicts of interest. So, they are likely a fee-only financial advisor in Los Angeles.

It's a good idea for readers to always verify a firm's compensation structure before starting a working relationship with a wealth management firm in Los Angeles, or anywhere else.

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

Innovating Fiduciary Financial Advisors

Priding themselves on always innovating and being a change-maker for industry standards, AdvicePeriod stands as a true fiduciary.

This Los Angeles wealth management firm has always adopted a stance of putting the client's interest first and being proactive with financial planning advice. Many of the approaches they championed in their early years 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

With a unique mix of experience and expertise, AdvicePeriod says clients will see the difference in their first meeting with their Los Angeles financial advisors. Their models are varied and tailored to a client's unique needs. Here is an overview of 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



Simplicity

We translate industry jargon and highly complex concepts into everyday English.



Action

We gather all paperwork, work with other advisors, and provide consolidated reporting.



Accountability

We are committed to pure transparency and the elimination of any perceived or real conflicts of interest.

Top-Rated Financial Advisors in Los Angeles, California

Rating Summary

With a spirit of being a trailblazer instead of a follower and an intense focus on building a proper foundation for each client's financial plan, AdvicePeriod is one of the top financial advisors in Los Angeles that works to proactively manage their clients' wealth.

They have a number of industry accolades and serve clients in all phases of life, with their "break-the-mold" style of financial advisory services and believe in complete fee transparency.

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

Related: [Top Financial Advisors in Houston, Texas](#)

Aspiriant Review

With a team of 175 and a focus on delivering long-term, consistent wealth management services, [Aspiriant](#) is a [fee-only](#) financial advisor in Los Angeles. They pride themselves on delivering powerful, far-sighted, and intelligent customized financial planning advice to each client.

As a top financial advisor in Los Angeles, Aspiriant is focused on attracting the best advisor talent, cultivating a strong workplace culture, perfecting the client experience, and eliminating all 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 knows that providing the best financial guidance for their clients, involves, incisive in-house research, serious rigor, access to a world of opportunities, and a complete commitment to innovation

Los Angeles financial advisors at Aspiriant can help you 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 and fulfill life-long financial dreams, without risking your financial present.

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 for my long life?
- How can I mitigate my tax losses?
- How should I organize my estate and plan for wealth transfer to the next generation?

Family Office Planning

Aspiriant's family office services are designed to make the overwhelming become simple and streamlined. The Los Angeles financial advisors at Aspiriant working in the family office area number 35, and are experts in all areas of financial planning, such as tax, estate, retirement, investments, bill pay, real estate, philanthropy, and budgeting.

This wealth management firm in Los Angeles can help clients handle a variety of 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 clients giving with their values, choose between a simple structure or private foundation



Best Financial Planners in Los Angeles, CA

Rating Summary

Compared to other top-rated Los Angeles financial planners, Aspiriant stands out for their client-centric approach. The goal of making investment and wealth planning easy, and their commitment to forming long-term relationships with their clients and helping them with every step of their financial lives.

The firm with coast-to-coast offices also has a unique sense of approachability, a user-friendly website and down-to-earth explanations of their services and value propositions. This all makes Aspiriant a great choice for clients who are hiring a Los Angeles financial advisor for the first time.

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

EP Wealth Advisors Review

[EP Wealth Advisors](#) is a Los Angeles top financial advisor that serves clients throughout the region. They operate in seven locations in California, two in Colorado, and one in Washington state.

EP believes in a full-bodied approach to wealth management that looks beyond only portfolio performance and also includes other important pieces of the financial puzzle like mortgages, insurance, taxes, and more.

EP Wealth Advisors is a [fee-only](#) firm that is also a fiduciary with a legal obligation to put their clients' best interests above all else.

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

“Investing in Women” Initiative

Championing a formerly underserved segment when it comes to financial planning, EP Wealth Advisors started their “Investing in Women” initiative to provide women, who often outlive their male counterparts, with the right tools and pathways to grow their careers.

Their mission to empower women and help them plan for a successful financial future is summarized in “Three C’s”:

- **Colleagues:** Promoting a workplace culture where women can participate and talk openly
- **Clients:** As personal financial advisors for women, EP helps them reach their life goals
- **Community:** With a focus on educating the younger generations on the importance of financial literacy



Top-Rated Financial Planners in Los Angeles, CA

Financial Planning Made Easy

It can get overwhelming first working with a financial advisory firm in Los Angeles, so EP Wealth Advisors works to simplify the process into four steps that are easy for clients to digest.

1. They start with Simplify, which is the consolidation of all your financial documentation into one place.
2. Next is Integrate, where they evaluate your current financial situation from a big-picture perspective.
3. After that is Forecast, where you'll receive a financial probability analysis in relation to your goals.
4. The last step is Prioritize, at which point you'll be given a recommendation on how to best achieve your financial goals.

Rating Summary

With a large team spanning three states and an easy-to-follow integrated approach to wealth management, EP Wealth Advisors is a top financial advisor in Los Angeles. Their commitment to the client as a fiduciary and fee-only firm, garner trust that they have no conflicts of interest.

Their “Investing in Women” initiative sets this top Los Angeles wealth management firm apart as a leader in their industry and one that takes a proactive approach to make their community better and more inclusive.

We are pleased to welcome this top LA financial firm to our ranking this year. Their dedication to their clients and to making their industry better have earned EP Wealth Advisors a 5-star rating in 2019.

Read More: [Top Wealth Managers and Advisors in Florida](#)

Harris Financial Advisors Review

[Harris Financial Advisors](#) is an independent, [fee-based](#) wealth management firm that has been assisting clients with financial planning since 1992 from their Torrance, California location.

They work on the principle that the cornerstones of any meaningful partnership are collaboration, transparency, trust, and education. They have a commitment to empowering their clients to make informed life decisions for a sound financial future.

While AdvisoryHQ prefers to rank fee-only advisors, the strong commitment to transparency and the fact they hold a [fiduciary duty](#) are factors that caused us to include Harris Financial Advisors as one of the top financial planners in Los Angeles.

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

Financial Planning for Women

As times have changed, so have the financial management needs of women. Today’s women are accomplishing more than ever, earning higher salaries, advanced degrees, and becoming household breadwinners and their wealth management should match those new norms.

As a top wealth manager in Los Angeles, Harris Financial Advisors provides support and guidance to women through a multitude of financial challenges, including:

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

It is worth noting that this focus on providing expert financial services for women is no accident—the firm was founded by [Mary Harris, CFP®](#), a single mom of two children that recognized the need for financial education and empowerment for women decades ago.

Structured Financial Planning Process

The team at Harris Financial Advisors uses an organized and structured financial management process to ensure the most productive and personalized financial plan for their clients.

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

- Organization—Bringing order to your financial life
- Accountability—The help you need to follow through on financial goals
- Objectivity—A fresh, third-party point of view to avoid emotionally-driven decisions
- Proactivity—Anticipating transitions and ensuring you're prepared for them
- Education—Providing clients with the knowledge they need to make smart decisions
- Partnership—Not just working for you, but with you to accomplish your goals



Top-Rated Wealth Management Firms in Los Angeles, CA

Rating Summary

Harris Financial Advisors ranks as one of the top Los Angeles advisory firms due to their commitment to putting the client's needs ahead of their own and working as an informed partner to help clients make well-planned, strategic decisions.

Their services for Women in Transition and pioneering approach to serving the financial needs of women are particularly notable, making the firm a very valuable resource for women in southern California and solidifying Harris Financial Advisors' 5-star rating.

Related: [Top Financial Advisors in San Diego, California](#)

HCR Wealth Advisors Review

[HCR Wealth Advisors](#) brings 30 years of real-world experience to their financial planning firm in Los Angeles. Their specialty is in business and insurance services as well as providing independent financial planning and wealth management and consulting.

They have a team of highly skilled independent thinkers and advisors that are focused on serving the best interests of the client at all times. HCR remains fully engaged in your process, empowering you to make risk-controlled financial decisions that will help you get to where you're going.

While HCR Wealth Advisors doesn't specifically mention whether they are a fee-only or fee-based wealth manager in Los Angeles, [they note that](#) HCR doesn't accept commissions from mutual fund companies or money managers and doesn't use proprietary products.

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

Guidance Through All Life's Transitions

HCR's team of top-rated Los Angeles financial advisors understand that life is full of transitions as well as financial markets that can be unpredictable. Their aim is to help clients be ready to face and overcome all of life's challenges with a sound financial strategy.

Their strategy includes integrating investments, retirement plans, and financial targets to give you a plan that matures along with you and can handle transitions such as:

- 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 Advisors makes planning your future financial strategy simple with their 7-Step process to guide you through each important facet of financial planning.

Together with this innovative Los Angeles wealth management firm, you'll go through the following steps:

1. Establish goals and objectives
2. Build an "income and needs projection"
3. Create a framework for investment allocation
4. Customize a private client online portal
5. Review investment strategy and track progress
6. Monitor and analyze your portfolio's growth
7. Evaluate and adjust as life evolves



Top-Rated Los Angeles Financial Advisory Firms

Rating Summary

If you're looking for the best financial advisor in Los Angeles that is there to advise you and not to sell you, then HCR Wealth Advisors is an excellent choice to partner with in 2019.

They have a large variety of financial services along with a comprehensive planning process, and a keen understanding of how life transitions can impact financial health, earning the firm an overall 5-star rating.

Don't Miss: [Best Financial Advisors in Charlotte, North Carolina](#)

Miracle Mile Advisors Review

[Miracle Mile Advisors](#) is an independent registered financial advisor founded by ex-Wall Street advisors wanting to create something better. They specialize in providing sophisticated wealth management to high-net-worth families, individuals, and businesses in the Los Angeles area.

Their financial advisors all have an average of over 18 years of experience advising some of the wealthiest families in the country.

Miracle Mile is a [fee-based](#) wealth management firm in Los Angeles, but their fiduciary commitment to always put their client's best interest first is why they're included in our ranking of the top LA financial advisors.

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 innovated several investing processes to increase the value to your investments while decreasing your overall risk. Here are the key steps of this Los Angeles wealth management firm's approach.

Analyze

Your financial advisor team analyzes your current portfolio using a holistic approach that looks at fees, performance, and risk. This allows Miracle Mile Advisors to pinpoint excessive fees that may be eating into your returns and recommend a specific and customized allocation of your assets.

Implement

These Los Angeles financial advisors will build a personalized portfolio using low cost, tax-efficient index funds that include necessary asset classes to bring you optimal returns. Your portfolio is then managed proactively.

Monitor and Grow

Clients receive transparent reporting through quarterly performance reports that are customized just for them. This LA financial advisor also has a goal to be in constant contact with their clients and meet with them at least quarterly either in person or by phone to ensure your investments stay on course during any life changes.

Peace of Mind

Through capital preservation and monitoring of market conditions, this Los Angeles financial advisory firm applies principals such as risk management and liquidity when managing your portfolio.



Best Financial Planners in Los Angeles, California

Customized Planning Services

Miracle Mile Advisors tailors their plans to each client because they feel that no two plans should be exactly alike, because they should reflect the specific lifestyle and financial goals of each person.

This Los Angeles wealth management firm helps clients anticipate and maneuver their financial plan to include any of life's major events such as:

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

Rating Summary

While this LA wealth manager does adhere to a fee-based structure, Miracle Advisors takes an independent approach as a fiduciary, which maintains the best interest of the client, removing doubts about any potential conflicts of interest.

With an independent mindset, personalized planning services, and a low-risk investment approach, Miracle Mile Advisors has earned their place as one of the top financial advisors in Los Angeles to consider partnering with this year.

Popular Article: [Top Financial Advisors in Philadelphia, PA](#)

Navigoe Review

[Navigoe](#) traces its roots back to 1993 and predecessor, Leonard Wealth Management. This [fee-only](#) Los Angeles wealth management firm offers an education-based process designed to help you understand all financial decisions without using jargon.

As a true fiduciary, Navigoe works to objectively navigate each client successfully through choppy financial waters, no matter what challenges may arise. Their name comes from the Latin term for sailing.

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

Personalized, Client-Centric Process

Choosing the right financial advisor in Los Angeles can be a process. Navigoe believes it's vital that each client and their financial advisor are on the same page, so they set aside 3-5 meetings to gain an in-depth understanding of each client's financial goals and needs.

Keeping with their nautical theme, this client-centric introductory process includes:

- Introductory Meeting to Meet the Crew
- Discovery Meeting to Prepare for the Voyage
- Charting the Course
- Getting Ready to Set Sail

Fee-Only Pricing & Fiduciary Commitment

Navigoe represents the highest standards of ethics and best practices among Los Angeles financial planning firms. Their fee-only pricing structure instills trust that clients will receive completely unbiased advice, free from any conflicts of interest from commissions or referral income.

As fiduciary, the Los Angeles financial advisors at Navigoe are legally bound to put their clients' best interests ahead of all else, providing a foundation of trust and transparency between advisors and their clients.

Navigoe maintains an active membership with professional organizations such as:

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



Top-Rated Financial Advisors in Los Angeles

Rating Summary

While Navigoe may not be the largest Los Angeles Wealth Management firm, they count among their staff, Roxie “Dog in Chief”, which exemplifies their welcoming and friendly approach. This firm is truly client-centric, which can be seen in their processes and practices, making them a competitive choice among Los Angeles financial advisors.

The firm serves a wide variety of clients all with diverse financial needs and goals. In addition to a fiduciary commitment and a fee-only philosophy, Navigoe also brings decades of experience and an enlightening education-based process, earning the firm a 5-star rating overall.

Westmount Asset Management, LLC Review

[Westmount Asset Management, LLC](#) has enjoyed witnessing the direct impact of their work in their clients' lives for over 28+ years. While serving both institutional and private clients, this financial advisory firm in Los Angeles blends sophisticated institutional asset management strategies with a robust set of consulting and planning services.

While the Westmount does not explicitly state whether they are a fee-only or fee-based wealth management firm in Los Angeles, they do mention that they were one of the first to adopt the [fiduciary](#) advisor model “that eliminated 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

Westmount takes an in-depth approach to investing that's designed to include a rich discussion with clients so they can completely get to know them and understand their financial situation and future goals. Westmount outlines its investment approach by describing five fundamental tenants they follow:

- Where other firms are finished, they're just getting started
- They adhere to convention, but not rigidly
- They're big on alternative investments
- They're long-term investors, mostly
- They welcome people looking to invest in positive change

Context Driven Approach to Financial Planning

The best investment advice has a context to understand all the facets of someone's life and the investment marketplace. The reason for the “dig deep” philosophy of this wealth management firm in Los Angeles is to understand each client's needs, wants, and dreams so they can design a financial plan is relevant to their lives.

Westmount's financial planning process involves:

- Creating a financial roadmap
- Answering life's important questions about things like social security and Medicare options, retirement timeline, and funding a child or grandchild's education
- Offering clarity and organization for the wealth management process
- Coordinating with other financial experts in their clients' lives to provide a comprehensive financial experience



Best Wealth Management Firms in LA

Rating Summary

As one of the best financial advisors in Los Angeles that has earned a 5-star rating, Westmount takes the time to really get to know their clients and their financial needs and dreams, so they can give them a personalized and comprehensive financial roadmap for the future.

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

L&S Advisors Review

[L&S Advisors](#) has been offering investment services to families, individuals, advisors, and institutions for over 30 years. They seek the choices each client needs to meet their own personal financial goals, including equity and fixed income strategies and multi-strategy blends with custom portfolios.

This top-rated Los Angeles wealth management firm is an independent [fee-only](#) Registered Investment Advisor (RIA) 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

As a client of L&S Advisors, you can take advantage of carefully curated approaches designed to maximize your return and protect you from unnecessary risk.

No matter what your personal preference, this LA wealth management firm offers several strategies and multi-strategy blends to meet your needs. Each of the following areas includes their own strategy subsets.

- [L&S Guardian Equity Strategies](#): For growth through concentrated tactical participation and a strong focus on capital preservation.
- [L&S Explorer Equity Strategies](#): For growth through broad market diversification.
- [L&S Sprinter Equity Strategies](#): For growth through consistent market participation.
- [L&S Fixed Income Strategies](#): Primary focus on yield.

- Customized Strategies: Customized portfolios to meet client-specific investment goals.

L&S Risk Pulse™

L&S puts risk management as their top priority and it takes a front seat in each and every investment strategy, portfolio, and client relationship. L&S Risk Pulse™ is its proprietary, real-time evaluation of overall market risk.

This tool provides a deep quantitative and qualitative analysis that weighs market risks and helps this LA wealth management firm safeguard client portfolios and minimize downside exposure.

Rating Summary

If you're seeking a trusted financial partner to implement expert investment strategies and portfolio allocation, L&S Advisors is a thoughtful choice for wealth management in Los Angeles. They use multiple strategies to personalize clients' investments for the best outcomes and lowest risk.

However, potential clients should be aware that L&S Advisors is solely an investment manager, that does not offer additional financial services like several of the other Los Angeles wealth management firms on our list, ultimately limiting the firm in comparison, which is why they scored a 3-star rating.

Those who need other services outside of portfolio management—like budgeting, cash flow allocation, tax planning, or retirement planning—may want to seek out another Los Angeles financial planner instead.

Conclusion—Top 11 Best Financial Advisors & Wealth Management Firms in Los Angeles

When choosing a financial advisor in Los Angeles, there are several criteria you want to consider. Such as the clientele they cater to and whether they work with all levels of client net-worth.

Certain LA financial advisors work with a more select group of high-net-worth or institutional clients, while others do business independently and are more accessible.

Fee structure and costs are also another important comparison point between Los Angeles-based financial advisors. You'll want to be aware of whether they are fee-based, fee-only, and how they structure client payments and fees.

To ensure a productive initial meeting with a potential LA wealth management firm, it's a good idea to make a list of all your investable assets, financial goals for the future, and any specific upcoming life events, such as a new home or education planning.

We hope that our list of top-rated financial advisors in Los Angeles has given you a helpful guide while planning for the future. We feel that any of these firms would be excellent ones to consider for financial guidance in 2019.

Rate Table Disclaimer

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

Image sources:

- <https://abacuswealth.com/abacus-story/>
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