NEWS

For Immediate Release

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HCR Wealth Advisors Wins Multiple Awards in the Los Angeles Business Journal and Los Angeles Times

Independent wealth management firm's three senior executives listed as "Leaders of Influence" and "Finance Visionaries" in Los Angeles

LOS ANGELES, CA (April 26, 2021) – HCR Wealth Advisors, a comprehensive financial planning and investment management firm known for focusing on all aspects of their clients' financial well-being, recently won multiple awards within the Los Angeles community. Three senior executives – Greg Heller, CFP®, Founder and CEO; Steve Weinberger, Senior Managing Director; and Michelle Katzen, CFP®, CDFA®, Managing Director – were named "Leaders of Influence" among Wealth Managers in Los Angeles in the Los Angeles Business Journal, as well as "Finance Visionaries" in the Los Angeles Times' Banking & Finance Magazine. In addition, Katzen was listed among "Women of Influence" in Finance in the Los Angeles Business Journal.

"It is a tremendous honor for these prestigious publications to recognize Steve, Michelle, and I among the financial advisory and wealth management community in Los Angeles," said Greg Heller, Founder and CEO of HCR Wealth Advisors. "However, I really view these awards as recognition for our firm as a whole. Any success we have achieved individually is the direct result of the collective effort of our entire team. I am proud that our team works together every day to deliver a first-rate client experience, as we help our clients navigate the growing challenges of the current economy and markets."

SELECTION CRITERIA FOR AWARDS

The Los Angeles Business Journal highlighted 34 individual financial advisors, focusing on how these professionals contribute to the financial services industry and the Los Angeles community. The article notes that the professionals featured did not pay to be included, and that their profiles were drawn from nomination materials submitted to the Los Angeles Business Journal. Those selected for inclusion were reviewed by the editorial department and chosen based on a demonstration of impact made on the profession and in the community.

"There are some truly outstanding professionals making up the Los Angeles wealth management landscape," the Los Angeles Business Journal said in a statement. "We've shone the spotlight on some of the very best of them in our "Leaders of Influence" list, along with information about their careers, practices, and a quick look at what makes them so good at what they do. Congratulations to the trailblazing professionals who made this list and thank you for your contributions to the local economy and the financial stability of the individuals and families that live here."

To learn more about the selection criteria and see the full "Leaders of Influence" list of Wealth Managers in the Los Angeles Business Journal, please click here. To see Michelle Katzen's profile in the "Women of Influence: Finance" list, please click here.

The list of "Finance Visionaries" in the Los Angeles Times was published by the Los Angeles County Banking and Finance Magazine, featuring trends, updates, and visionaries within the financial services industry. The publication notes that the content does not involve the editorial staff of the Los Angeles Times and that selections are made independently, without regard to whether or not an individual or company advertises with the L.A. Times.

To see the full list of "Finance Visionaries" in the Los Angeles Times' Banking & Finance Magazine, please click here.

BACKGROUND ON HCR WEALTH ADVISORS' AWARD WINNERS

With decades of cumulative experience helping clients live their best financial lives, the three senior executives and award recipients from HCR Wealth Advisors were chosen based on their industry experience, knowledge and expertise, professional impact, community involvement, and service to their clients.

Greg Heller, CFP® is Founder and Chief Executive Officer of HCR Wealth Advisors. His entrepreneurial acumen has steered the phenomenal growth of the company over the last 30+ years, from a two-person, family operated financial services boutique to a multi-faceted, SEC Registered Investment Advisory firm whose client investment portfolios total around $1.5 billion dollars. Under his leadership, HCR has expanded their advisory services and client roster to include many high-net-worth individuals in entertainment, sports, and the technology sectors, as well as private corporations and non-profit organizations. Greg received a B.S. in Finance from the University of Southern California, is a Licensed Securities Broker with FINRA, an Investment Security Corporation Registered Representative, a fully licensed California Life Insurance Agent, and a Certified Financial Planner™ (CFP®) professional. He gives back to the community by being involved with Equality California, a non-profit civil rights organization that advocates for the rights of LGBTQ+ people in California, the Jewish Federation of Greater Los Angeles, a non-profit organization that has a profound impact on the well-being of Jews in Los Angeles, and Jewish Big Brothers Big Sisters of Los Angeles, where he volunteers as a Big Brother.

Steve Weinberger is Senior Managing Director of HCR Wealth Advisors. Steve joined the firm in 1998 and has over 25 years of experience in the financial services industry. He spends time with clients to develop personalized investment portfolio strategies and points out exposure and potential risks to ensure that clients are ready for unexpected curve balls. Steve specializes in working with clients who are going through life transitions (i.e., retirement, widowhood, divorce, selling a business, etc.). Prior to joining HCR, he worked at Prudential Insurance. Steve has an MBA with an emphasis in finance from Pepperdine's Graziadio Business School, is a Licensed Securities Broker with FINRA, an Investment Security Corporation Registered Representative, and a fully licensed California Life Insurance Agent. He gives back to the community by being involved with Los Angeles charter schools and coaching sports at Los Angeles public schools.

Michelle Katzen, CFP®, CDFA®, is Managing Director of HCR Wealth Advisors and is a member of HCR's Investment Committee. She joined HCR in 2014 and has worked in the financial services industry since 2008. Michelle is a Certified Financial Planner™ (CFP®) professional who works closely with clients to structure and implement investment strategies that meet their specific needs and goals. Michelle is also a Certified Divorce Financial Analyst® (CDFA®) professional and specializes in helping clients understand the financial impact of dissolution, including asset overview, tax implications, and the changes to prepare for when a divorce is imminent. Prior to joining HCR, Michelle served as a capital markets specialist and investment consultant at Toyota Financial Services, an interest rate derivatives trader at Union Bank, and a financial advisor at UBS Financial Services. Michelle graduated from UCLA Anderson School of Management with a master's degree in Financial Engineering and completed UCLA's Personal Financial Planning Program. She earned her bachelor's degree in Mathematics with minors in Business Management and Statistics from Colorado State University. She gives back to the community by being involved with the Leukemia and Lymphoma Society (LLS), Women in Wealth, and Phelps Forward.

ABOUT HCR WEALTH ADVISORS

Established in 1988, HCR Wealth Advisors provides financial planning, investment management, and other financial services from its Los Angeles location. In addition to creating investment portfolios, the team of experienced fiduciaries focuses on all aspects of clients' financial well-being, helping to develop tax strategies, create retirement plans, and provide estate planning assistance. By providing truly independent comprehensive services, underpinned by extensive experience and a commitment to cultivating lifelong relationships with clients, HCR has proven itself as an exceptional advisor in both life and wealth. Although the firm serves a variety of high-net-worth individuals and families, HCR specializes in serving business owners, divorcees, pre-retirees, athletes, and figures in the entertainment industry. For more information, visit www.HCRWealth.com.

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