

NEWS

For Immediate Release

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HCR Wealth Advisors' Michelle Katzen and Alyssa Phillips Named Finalists in 2022 Wealth Management Industry Awards

Firm leaders also nominated for the Los Angeles Business Journals' 2022 Women's Leadership Awards

LOS ANGELES, CA (June 22, 2022) – [HCR Wealth Advisors](#), a comprehensive financial planning and investment management firm known for focusing on all aspects of their clients' financial well-being, recently had two leaders in their firm named finalists for the 2022 [WealthManagement.com Industry Awards](#), an annual competition and industry-leading awards program often referred to as the Wealthies. [Alyssa Phillips](#), Chief Operating Officer and Chief Technology Officer, was named a finalist for 'Chief Technology Officer of the Year' and [Michelle Katzen, CFP®, CDFIA®](#), Managing Director, was named a finalist for 'Rising Star of the Year' – both in the 'Individual RIA Firm Leaders' category.

“Michelle and I are honored and excited to be named finalists in the Wealthies Awards,” said Phillips. “This recognition reinforces all of our hard work to ensure HCR runs as smoothly as possible and serves our clients to the fullest. We are looking forward to connecting with all the other finalists while attending the awards ceremony and gala in New York in September!”

As Chief Technology Officer, Phillips recently led an upgrade of HCR's entire tech stack and implemented a new technology system to manage it all. She significantly increased technology adoption within the firm, upgraded the firm's portfolio management system, migrated two legacy systems, improved workflows, and digitized many processes. She was recently profiled in [Authority Magazine](#) and in [Bizwomen by The Business Journals](#), is a board member of the Schwab Technology, Operation and Services Board, and recently spoke at the Los Angeles RIA Summit on a Technology Solutions and Practice Management panel. She will also be a panelist in an upcoming [webinar hosted by Financial Planning Magazine](#) on how RIAs can establish their value and gain a competitive advantage.

In addition to serving as Managing Director, Katzen is a part of HCR's Investment Committee. She 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. Katzen 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. Katzen was named a [“Leader of Influence”](#) among Wealth Managers in the Los Angeles Business Journal in 2021 and 2022, was listed as a 2022 [“Woman of Influence”](#) in Finance in the LABJ, and was included in a list of [“Finance Visionaries”](#) in the Los Angeles Times' 2022 issue of Banking & Finance Magazine. She has been featured or quoted in Barron's, Business Insider, TheStreet, Yahoo! Finance, and NextAdvisor by TIME.

THE 2022 WEALTHIES AWARDS COMPETITION AND CEREMONY

The WealthManagement.com Industry Awards are judged by a [panel of independent judges](#) made up of top names in the industry, overseen by editor-in-chief David Armstrong. The eighth annual installment received a record-shattering number of nominations, with nearly 1,000 entries from more than 350 companies. In all, 225 organizations were selected as finalists, with Advyzon being one of ninety-two firms recognized for outstanding achievement in multiple categories.

The final round of judging has now begun, with the winners in each category to be revealed on September 8, 2022, at the grand gala and awards ceremony taking place at the Ziegfeld Ballroom in New York City.

“The record-setting participation in our industry awards this year is a testament to the value firms continue to place in the Wealthies as their best opportunity of the year to enhance their reputation, increase their brand awareness and set their organization apart from the competition,” said William O’Conor, Managing Director of WealthManagement.com. “This year we’re pleased to announce that we’ll be celebrating and honoring our awards finalists and winners with in-person events in New York City, along with simultaneous virtual broadcasts accessible to a broader audience of awards team members and other wealth management professionals across the nation.”

To learn more about the awards ceremony, see category details, and more, [please click here](#).

LOS ANGELES BUSINESS JOURNAL’S 2022 WOMEN’S LEADERSHIP SYMPOSIUM & AWARDS

In addition to the Wealthies, both Alyssa Phillips and Michelle Katzen were nominated and named finalists for the [Los Angeles Business Journal’s 2022 Women’s Leadership Awards](#), with Phillips being named a finalist in the “Executive of the Year (Non CEO)” category and Katzen a finalist in the categories of “Mentor of the Year” and “Women to Watch”.

Winners of this year’s awards will be announced at the 2022 Women’s Leadership Symposium, hosted by the Los Angeles Business Journal at the JW Marriott Los Angeles LA LIVE on June

29th. In addition to the awards ceremony, which will honor women of outstanding achievement in the Los Angeles business community, the event will include educational panels, a luncheon, networking, and more.

The Los Angeles Business Journal is highlighting a variety of women professionals from throughout the Los Angeles community, focusing on how these professionals contribute to their company, their industry, and the Los Angeles community. The professionals that were nominated did not pay to be included and were selected based on nomination materials submitted to the Los Angeles Business Journal and reviewed by the editorial department.

For those interested in registering for the symposium or learning more, [please click here](#).

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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