

NEWS

For Immediate Release

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HCR Wealth Advisors' Michelle Katzen Wins 'Rising Star of the Year' Award at 2022 Wealth Management Industry Awards

Additionally, Alyssa Phillips spoke on a CTO panel at the 'Wealthies' and was named finalist for CTO of the Year, plus other firm leaders were panelists at other recent key industry events

LOS ANGELES, CA (October 11, 2022) – [HCR Wealth Advisors](#) (HCR), a comprehensive financial planning and investment management firm known for focusing on all aspects of their clients' financial well-being, announced that [Michelle Katzen](#), CFP®, CDFIA®, Managing Director, was recently named a winner for the 'Rising Star of the Year' award at the 2022 [Wealth Management Industry Awards](#), an annual competition and industry-leading awards program hosted by *Wealth Management Magazine* (often referred to as the 'Wealthies'). Additional honors and speaking appearances that put company executives in the spotlight are detailed below.

MICHELLE KATZEN DUBBED 'RISING STAR OF THE YEAR'

The 'Rising Star of the Year' award celebrates individuals and/or executives within a financial advisory firm who have demonstrated vision, creativity, integrity, leadership, and high performance in making an impact on their firm, the industry, and wealth management in general within the past year.

"We are honored that Michelle was named a winner of the 2022 Wealth Management Industry Award for 'Rising Star of the Year,'" said Greg Heller, Founder and CEO of HCR Wealth Advisors. "Reputable industry awards like these pay tribute to our contributions and inspire us to continue working towards greater success by highlighting our achievements within our industry."

The Wealth Management 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, including HCR Wealth Advisors, were selected as finalists.

For a full list of the winners and finalists from the 2022 Wealthies, [please click here](#). For more information about Katzen, [please click here](#).

ALYSSA PHILLIPS NAMED WEALTHIES FINALIST, PARTICIPATES IN CTO PANEL IN NYC

In addition, [Alyssa Phillips](#), Chief Operating Officer and Chief Technology Officer at HCR, was named a finalist for ‘[Chief Technology Officer of the Year](#)’ within a Registered Investment Advisory (RIA) firm. Phillips also participated in a [CTO Buyers Panel](#) during the afternoon sessions at the Wealthies on September 8th, along with Greg Gates, Managing Director and Chief Technology and Information Officer with LPL Financial and Tuppy Russo, Head of Private Wealth Infrastructure at AllianceBernstein. The panel was moderated by Tim Welsh of Nexus Strategy.

The panelists and moderator shared their insights, strategies, and approaches to supplying advisors with the latest tools to enhance efficiency and satisfy clients. Phillips specifically highlighted the benefits of finding tech advocates and early adopters within a firm’s advisor pool, strategies for increasing advisor adoption of tech solutions and tools, the importance of bringing systems together, how to prepare for cybersecurity threats, and more.

[Please click here](#) to read more about the panel on WealthManagement.com. For more information about Phillips, [please click here](#).

HCR FIRM LEADERS IN DEMAND AS PANELISTS AT KEY INDUSTRY EVENTS

In addition to participating on the CTO panel at the Wealthies, Phillips recently participated on a panel at the [SS&C Deliver Conference](#), which took place in Orlando from October 2nd – 4th, titled ‘How Wealth Managers are Identifying Customer Profitability and Assigning Service Levels’. Part of the conference’s ‘Wealth Management’ track, Phillips was a panelist alongside Jonathan Lucas of SS&C Technologies and James McClenahan of SS&C Advent. The SS&C Deliver Conference, hosted by SS&C Technologies Holdings, is a premier industry event for executives and decision-makers across all SS&C solutions seeking hands-on learning, industry insights, and networking. SS&C sells software and software as a service to the financial services industry and is the world’s largest hedge fund and private equity administrator, as well as the largest mutual fund transfer agency.

[Greg Heller](#), CFP®, Founder and CEO, recently spoke at The Institutional Investor RIA Institute’s 11th Annual [RIA West Investment Forum](#) on a panel focused on how advisory firms can ‘Carve Out a Niche’ and realize new levels of success. The advisor-only panel was held September 28th in Los Angeles. The RIA West Investment Forum convenes North America’s premier RIAs for thought-provoking discussions via intimate roundtables. The RIA Institute drives innovation in the dynamic and rapidly growing RIA community, helping RIAs make the investment decisions and practice management choices that will best serve their underlying clients.

[Steve Weinberger](#), Senior Managing Director, participated in a panel titled ‘Beyond the Public Markets: Unleashing the Diversifying Power in Private Assets’ at the [Private Wealth Management Summit](#) on September 28th in Los Angeles. The Private Wealth Management Summit, hosted by Marcus Evans Group, is an invitation-only, premium summit bringing together leading private wealth management investors and innovative fund managers and consultants. The summit’s content is aligned with key investment challenges and interests, relevant market developments, and practical and progressive ideas and strategies adopted by successful pioneers.

Finally, [Sam Puathasnanon](#), Chief Compliance Officer, recently participated in a webinar titled ‘Last-minute Tips to Prepare for the SEC’s New IA Ad Rule’, hosted by [Regulatory Compliance Watch](#) on September 27th. The virtual panel discussion featured a handful of industry experts sharing tips and insights to help financial advisors ensure compliance with the SEC’s new ad rule, which will expand the scope of communications that are considered “advertisements” and allow the use of testimonials, endorsements, third-party ratings, and hypothetical performance in advertisements. Regulatory Compliance Watch is a leading source of authoritative answers to the toughest compliance questions facing US investment advisors.

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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