

## NEWS

For Immediate Release

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# HCR Wealth Advisors Ranked as a Top 24 Financial Advisory Firm in Los Angeles by Expertise.com

*Independent wealth management firm also has three senior executives listed as “Leaders of Influence” in the Los Angeles Business Journal*

**LOS ANGELES, CA (December 7, 2021)** – HCR Wealth Advisors, a comprehensive financial planning and investment management firm known for focusing on all aspects of their clients' financial well-being, was recently listed as one of the [Top 24 Financial Advisory firms in Los Angeles](#) by Expertise.com. HCR has seen significant growth in the past year and a half, with assets under management increasing to over \$1.4 billion.

Expertise.com scored 902 financial advisors in Los Angeles and narrowed it down to the top 24 based on 25 variables across five categories: availability, qualifications, reputation, experience, and professionalism. Expertise.com hired mystery “shoppers” to call the firms anonymously and evaluate them, and firms who responded quickly, answered questions thoroughly, communicated politely and professionally, and demonstrated expertise and experience scored higher. HCR scored an ‘A’ in reputation, professionalism, friendliness, helpfulness, and detail, and an ‘A+’ in responsiveness.

“We’re very proud to be recognized by Expertise.com as a top financial advisory firm in Los Angeles,” said Greg Heller, Founder and CEO of HCR Wealth Advisors. “We pride ourselves on our professionalism, friendliness, helpfulness, responsiveness, and expertise, so it’s no surprise that we scored very high in all of these categories. We appreciate the mission of Expertise.com to connect people with the best local experts and are honored to be listed amongst these other top advisory firms as a resource in the Los Angeles community.”

To see the full list of the Top 24 Financial Advisory firms in Los Angeles, as well as HCR’s full listing and detailed scores, [please click here](#).

## **THREE SENIOR EXECUTIVES LISTED AS “LEADERS OF INFLUENCE: WEALTH MANAGERS” IN THE LOS ANGELES BUSINESS JOURNAL**

In addition, three senior executives at HCR were listed in the [Los Angeles Business Journal’s list of “Leaders of Influence”](#) among wealth managers in the Los Angeles area: [Greg Heller](#), CFP®, Founder and CEO; [Steve Weinberger](#), Senior Managing Director; and [Michelle Katzen](#), CFP®, CDFA®, Managing Director.

“There are some truly outstanding professionals making up the Los Angeles wealth management landscape,” said the Los Angeles Business Journal. “We’ve shone the spotlight on some of the very best of them here, 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.”

The Los Angeles Business Journal highlighted 35 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.

“It is a tremendous honor for the Los Angeles Business Journal to once again recognize Steve, Michelle, and I among this esteemed group of advisors,” said Heller. “However, I really view this as an award 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.”

To learn more about the selection criteria and see the full “Leaders of Influence” list of wealth managers in Los Angeles, [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](http://www.HCRWealth.com).

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