

THE TEN
MOST DEPENDABLE™

Wealth Managers

OF SOUTHERN
CALIFORNIA

**THE COMPANIES
SELECTED
EXCEED THE
CRITERIA BELOW**

+10 Years Experience

Signed Fiduciary Oath

Exceptional Client References

Comprehensive Range of Wealth
Management and Financial
Planning Services

No Lawsuits or Grievances

Minimum 50 Clients

Fee-based, Registered
Investment Advisor

Orange Capital Management

333 South Anita Dr., Suite 625
Orange, CA 92868

|| 800-481-PLAN || www.ocminc.net

We strive to lead the industry in providing innovative wealth management strategies and solutions to the high net worth community.

The Keller Group Investment Management, Inc.

18300 Von Karman, Suite 600
Irvine, CA 92612

|| 800-224-7931 || www.kellerinvest.com

Managing over \$1 Billion, our goal is simple –exceed client expectations for service and performance with results oriented solutions for their investment and financial planning needs.

Reed Financial Network

41391 Kalmia St., Suite 130
Murrieta, CA 92562

|| 951-696-6714 || www.dsreed.com

Reed Financial Network provides exit planning strategies to business owners wishing to sell or transfer their ownership interests.

Heller Capital Resources

11835 West Olympic Blvd., Suite 360
Los Angeles CA, 90064

|| 310-473-5445 || www.hellerfunds.com

We provide comprehensive personalized wealth management services based on security, communication and trust.

Churchill Management Group

5900 Wilshire Blvd., Suite 600
Los Angeles, CA 90036

|| 877-937-7110 || www.churchillmanagement.com

Since 1963, we have specialized in providing clients peace of mind and prosperity by delivering superior returns in favorable market periods and preserving capital in high risk environments.

**** Anchor Capital**

16140 Sand Canyon Ave., Suite 101
Irvine, CA 92618

|| 949-341-0000 || www.anchor-capital.com

Independent wealth management for families, trusts and institutions seeking consistent results and absolute performance.

JDM Financial Group

11301 Olympic Blvd., Suite 330
West Los Angeles, CA 90064

|| 310-479-4122 || www.jdmfinance.com

We specialize in helping clients make well-informed financial decisions; our expertise is in personalized retirement planning, portfolio management and client education.

Weatherly Asset Management

832 Camino Del Mar, Suite 4
Del Mar, CA 92014

|| 858-259-4507 || www.weatherlyassetmgt.com

We are an SEC registered advisor that provides quality, comprehensive and personalized wealth management services to the affluent client.

CASTRO Financial Group, Inc.

501 W. Broadway, Suite 800
San Diego, CA 92101

|| 877-234-4752 || www.castrofinancialgroup.com

We are a global wealth management company providing financial diversification; thus creating and investing our client's wealth through various means.

Leonard Wealth Management

417 Beryl Street
Redondo Beach, CA 90277

|| 310-697-0400

|| www.leonardwealthmanagement.com

We provide peace of mind through fee-only services, fiduciary responsibility, investment discipline and personal attention.

*** Selected for 2nd consecutive year*

www.themostdependable.com

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