

LEADERS OF INFLUENCE: WEALTH MANAGERS



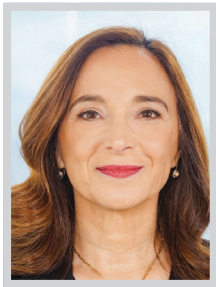
THE RIGHT WEALTH MANAGEMENT PROFESSIONAL DOES MORE THAN ADVISE YOU REGARDING HOW TO INVEST your money. He or she – and the financial institutions they represent – can genuinely prepare your entire family for financial stability and fiscal comfort for generations to come, and offer highly personalized plans for investing, charitable giving, and other specific needs.

There are some truly outstanding professionals making up the Los Angeles wealth management landscape. We've shone the spotlight on some of the very best of them here, along with information about their careers, practice 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.

Methodology: The professionals featured in these pages did not pay to be included. 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 on the Los Angeles community.

LEADERS OF INFLUENCE: WEALTH MANAGERS



DARYA ALLEN-ATTAR

Impact Director, Morgan Stanley Investing with Impact
Morgan Stanley

Darya Allen-Attar is a financial Advisor at the Santa Monica office of Morgan Stanley Wealth Management. Drawing on over 25 years of experience at Morgan Stanley, Allen-Attar focuses on providing a comprehensive institutional approach to investment management for foundation/ endowment portfolios of all kinds. With a strong background in socially responsible ‘Investing with Impact,’ Allen-Attar ranks among the 45 advisors nationwide (out of a network of 16,000 advisors at Morgan Stanley) who have earned the Impact Director Designation at the firm. She helps investors evaluate the key environmental, social, and governance challenges and opportunities facing their portfolios, as a critical component of managing long term portfolio risk. She is experienced at guiding invested capital into alignment with an organization’s core values, while focusing on prudent investment of the diversified portfolio, focused on risk managed optimized financial return.



JESSE AMARILLAS

Managing Director, Private Wealth Advisor
UBS Wealth Management USA

Jesse Amarillas is a nationally recognized financial advisor with over 20 years of experience. In his role at UBS Wealth Management USA, he is uniquely positioned to help corporations manage the complexities of equity compensation plan administration, with a specialized focus on executives and board members of publicly traded companies. Amarillas leads a Century City-based team that is committed to educating public company employees about the tools available to them, and specifically the services offered to executives and board members, including 10B5-1 trading plans, Rule 144, and cashless stock option exercise and sales. He graduated from the UCLA with degrees in biology and economics, joining UBS in 2009 to manage private clients with a focus on families that have a net worth of more than \$10 million. As senior portfolio manager, he has a special designation within UBS that allows him to run portfolios in equity and fixed income.



MATTHEW AYERS

Vice President
Alex Brown

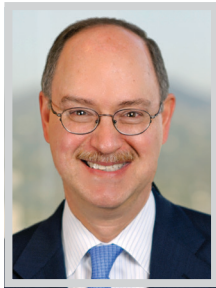
Matthew Ayers works as a client advisor at Alex Brown/Raymond James in Century City. He serves his clients through a model of holistic financial planning, disciplined investment strategies and proactive personal service. Ayers commits to discovering and understanding the financial goals of each of his clients and tailors personalized investment strategies designed to achieve their specific, unique needs. Although Ayers had a number of opportunities to focus exclusively on managing money, he discovered early in his career that his greatest passion was to help individuals and their families behind their wealth. He was drawn to the private wealth management industry, not only to exercise his financial expertise, but to develop lifelong relationships while improving the financial lives of his clients and their families. This passion is clearly seen in his influence and involvement in the lives of many people in Los Angeles.



RICHARD AZARLOZA

Chief Executive Officer/Portfolio Manager
Covington Capital Management

Richard Azarloza serves as Covington Capital Management’s chief executive officer and member of the Management Committee where his responsibilities include developing long-term strategy, executing operating plans and cultivating client relationships. He is also a portfolio manager, principal and serves on the company’s Board of Directors. Azarloza is a Chartered Financial Analyst charterholder with over 30 years of experience as both portfolio manager and research analyst, and holds the Certified Financial Planner certification. Azarloza primarily works with high net worth clients, foundations and endowment and manages more than \$550 million for family relationships that span decades. He is also an expert in trust and estate planning, retirement planning and tax strategy. He is a member of the FBI Los Angeles Citizens Academy Alumni Association, the CFA Institute, the CFA Society of Los Angeles, the Los Angeles World Affairs Council and Town Hall, and a director of the Rogolsky Family Foundation.



JAMES BERLINER

President and Chief Investment Officer
Westmount Asset Management

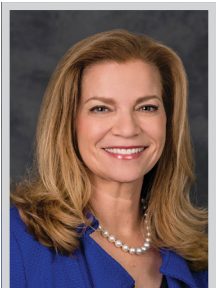
Jim Berliner co-founded Westmount Asset Management in 1990 and has since served as president and chief investment officer. Under his leadership, Westmount has grown into one of Southern California’s leading wealth management firms (currently managing more than \$4 billion), and one that is particularly well-known for its expertise in the private equity and debt markets. A former federal prosecutor, Berliner founded Westmount as a true fiduciary, putting his clients’ best interests first. He was drawn toward what was, at the time, a nascent model of delivering investment advice: that of the fee-only, independent advisor. Accordingly, Westmount became one of the earliest firms in the country to adopt this model by eschewing commissions and proprietary products and using outside managers to find innovative investment strategies based strictly on their merits. Berliner plays a pivotal role on Westmount’s Investment Committee and has helped the firm uniquely distinguish itself.



KARA BOCCELLA

Partner
Camden Capital

Kara Boccella is a partner of Camden Capital and has 27 years of experience advising legal professionals, executives, and entrepreneurs in all areas of wealth and investment management, including trust, retirement & estate planning, insurance analysis, corporate retirement benefits, company stock or partnership plans, tax planning, legacy divestment, charitable donation planning, home mortgage finance, and any other financial needs that arise. She is actively involved in portfolio management and investment selection as a member of Camden’s investment strategy team. Boccella takes a unique, all-encompassing view of each client’s financial situation and tailors her approach to suit their needs. Boccella makes clear recommendations and executes strategies that provide comprehensive, cost-effective, and balanced wealth solutions continuously monitored and adjusted as market conditions and lifestyle changes dictate. She is the person clients turn to to navigate difficult periods of their lives.



LISA CHAPMAN

Managing Director, Private Wealth Advisor,
CFP, CIMA, CRPS
UBS Wealth Management USA

Lisa Chapman is a financial advisor based in Long Beach, supporting individuals, families and foundations across Southern California. The California native has spent her entire 31 year-career as an advisor at one firm, UBS Wealth Management USA. She leads a group of women financial advisor partners who help high net worth clients address complex challenges from wealth accumulation and distribution to multigenerational wealth preservation and transfer. As someone who had never worked a day remotely over her 30+ year professional career, the transition to remote work as the pandemic unfolded could have proven difficult. Instead, Chapman and her team quickly transitioned to find improved efficiencies, remaining present and maintaining constant communication with their diverse client base of physicians, business owners and engineers. They maintained their trusted client relationships and thrived in what turned out to be a record year in terms of assets under management.



VIVIAN CHOW

Managing Director, Senior Vice President
U.S. Bank Private Wealth Management

As a Private Banking managing director, Vivian Chow leads a team of banking professionals who are responsible for providing clients with personalized service and sophisticated banking strategies. She directs specialized lending and deposit services to support the personal and professional banking needs of her clients. Her team has done close to one billion dollars in combined lending, deposits, and assets under management over the past 12 months. Chow has worked in the banking and financial services industry since 1991. Prior to joining U.S. Bank Private Wealth Management, she worked for several major financial institutions, where she managed banking teams. Chow has been an active and long-time board member of the Stuart M. Ketchum Downtown YMCA, serving the Los Angeles Downtown community to improve the lives of inner-city children, families, teens and adults with quality community-based programs. She is also highly involved in the bank’s Women and Asian Business Resource Groups internally.

Helping Los Angeles Invest in What's Important



No matter if it's navigating cash flow, re-allocating your retirement portfolio, or making sure you've adapted to the shifting tax laws, 2021 brought challenges and opportunities for how you build your wealth and your investments—especially if you're a business owner.

If you're looking for a wealth advisor for investments, tax, estate planning, and even your business, talk to one of EP Wealth's award-winning advisors.



Brian Parker, CFP®

Co-founder, Co-managing Director
2021, 2020, 2019, 2018 recipient of
LABJ's Wealth Management
Influencer of the Year



Derek Holman, CFP®, AIF®

Co-founder, Co-managing Director
2021, 2020, 2019, 2018 recipient of
LABJ's Wealth Management
Influencer of the Year

Call Today: **424-383-6845**

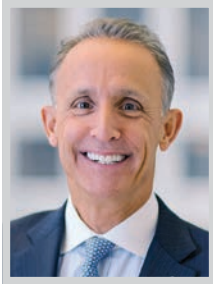
LEADERS OF INFLUENCE: WEALTH MANAGERS



DAVID CLAUSEN

Wealth Management Advisor
Northwestern Mutual

With over 20 years of experience in the financial services industry, David Clausen serves as a partner to attorneys, physicians, business owners, and families in building financial well-being. Clausen is regarded as a thought leader within the industry and has often been interviewed and published by the media. He joined Northwestern Mutual as an intern in February 1997 while he was attending UCLA. What originally started as a simple resume-builder for law school has turned into a nearly 20-year successful financial planning practice. Over time, Clausen has seen clients faced with increasingly complex and evolving financial circumstances. He believes those issues are best solved through a combination of rigorous financial analysis, industry leading solutions, and a relationship-based focus on the psychology that leads to good planning. His favorite part of the business includes watching his long-term clients achieve their goals and thrive once they experience financial security.



GARRETT D'ALESSANDRO

Chief Executive Officer, City National Rochdale,
Executive Vice President and
Head of Wealth Management, City National Bank
City National Rochdale

Garrett D'Alessandro joined the former Rochdale Investment Management (predecessor to City National Rochdale) in 1986 and is the chief executive officer. In addition to setting the strategic direction of the firm, he plays a key role in the firm's portfolio management and investment research functions. In this capacity he assists in determining the macroeconomic outlook and strategic asset allocations for the firm's strategies. At City National Rochdale, the focus continues to be on positioning portfolios to help clients achieve long-term investment goals. D'Alessandro's team has built a reputation for the way they communicate with clients, listening carefully to client concerns and staying focused on each client's strategic plan and long-term investment goals. Clients appreciate that level of support. City National Rochdale experienced record asset growth in 2020 as a result, despite being a year like no other for the investment community.



SCOTT DUNCANSON

Managing Director
Avitas Wealth Management

Scott Duncanson has been in the financial services industry for over 25 years. His career began at City National Bank where he specialized in commercial real estate acquisition and disposition. Over the next decade, Duncanson pivoted his sophisticated skill set into wealth management at both Merrill Lynch and UBS, advising high net worth families. Duncanson now serves as managing director for Avitas Wealth Management, bringing his knowledge of lending and complex debt solutions to the firm. He is passionate about having a positive impact on people's financial future. For Duncanson, wealth management is about trust and estate planning, managing money wisely and organizing wealth in a holistic and impactful way. He loves being a part of the forward-looking aspect of clients' lives and helping them prepare for generations to come.



ANDREW FULLER

Partner & Managing Director
Creative Planning

Andrew Fuller is a partner and managing director with Creative Planning. He graduated from the Johns Hopkins Carey Business School with a Master of Science in Finance and holds the Certified Financial Planner designation. With early ambitions of becoming a diplomat with the U.S. Department of State, Fuller's background in languages and political science helped expose him to multiple different cultures, forms of communication and ways of thinking. Those formative years helped shape him into a dynamic leader with the firm today who thrives in the diverse communities here in southern California by considering multiple perspectives while crafting comprehensive recommendations for his clients. Creative Planning has consistently been ranked as one of the top independent wealth management firms in the country and Fuller has led the most successful team at Creative Planning for the past two years, specializing in comprehensive wealth management.

At Avitas Wealth Management, we strive for excellence every day. Congratulations to our partners Catherine Gerst, Eric Taslitz, & Scott Duncanson on being recognized among the Leaders of Influence: Wealth Managers in Los Angeles by the LA Business Journal.

AVITAS WEALTH MANAGEMENT – YOUR ADVISOR FOR LIFE

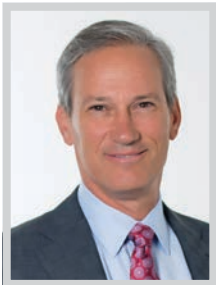


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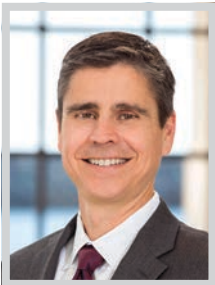
CATHERINE GERST
Principal
Avitas Wealth Management

Catherine Gerst has been in wealth management for 30 years. Her career began at Wells Fargo where she specialized in constructing municipal bond portfolios for the bank’s largest clients. She then teamed up with her now partners at Avitas Wealth while they were all at Merrill Lynch 20 years ago. Gerst now serves as principal of her own firm, Avitas Wealth Management. The firm manages assets for approximately 120 clients. Gerst’s passion revolves around fixed income portfolio management. Her clients benefit greatly from her experience, care, and skill she brings to bond portfolio management. Gerst specializes in working with families and bringing the next generation into the financial discussion. Her experience with issues that often concern wealthy families provide her with invaluable insights and she has a unique ability to connect with all sides and facilitate discussion, education, and strategy for wealth transition.



GREG HELLER
CEO/Founder
HCR Wealth Advisors

After starting his career at a brokerage firm, Greg Heller founded HCR Wealth Advisors based on core company principles that still support the company today. Established in 1988, the firm has spent decades earning a reputation for objectivity and empathy in the financial planning and investment management space. 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. Heller’s 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 managing over a billion dollars. Under his leadership, HCR has expanded the client roster to include many high net worth individuals in the entertainment, sports and technology sectors, as well as private corporations and non-profit organizations.



DEREK HOLMAN
Co-Founder and Managing Director
EP Wealth Advisors

Derek Holman is a managing director and co-founder of EP Wealth Advisors. For over 10 years Holman divided his time between managing operations and advising clients. In 2011, when the company reached over \$1 billion of assets under management, Holman rededicated the majority of his time to what he enjoys most: working with clients. Holman knows firsthand of the challenges that entrepreneurs, business owners and individuals face. He advises in comprehensive investment, retirement, estate and tax planning strategies. He has been recognized and quoted in a number of leading financial publications. Holman embraces integrity, objectivity and an entrepreneurial spirit within EP Wealth Advisors and inspires others to do the same. He is passionate about the community he serves and is consistently finding new ways to give back. Holman is a proud supporter of the Manhattan Beach Education Foundation, Tour de Pier, and his local church.



BRIAN D. HOLMES
President & CEO
Signature Estate and Investment Advisors

Brian D. Holmes is the president and CEO of SEIA. As of end of last year, SEIA and its affiliates manage \$13.6 billion of assets. He is one of SEIA’s four founding partners, who have shared over two decades of teamwork together and he currently sits on SEIA’s investment committee. Holmes has been in the investment management business for over 36 years, maintaining a successful independent private practice with his team for over 300 clients. He is a past member of the Schwab Institutional Advisory Board and served on the UCLA Department of Economics Board of Visitors to enhance the curriculum of the Business Economics major. Many notable clients, executive groups, corporations and universities have retained him for lectures, including guest lectures at UCLA’s undergraduate Economics and Investments classes. He is also involved with numerous charities in the Southern California area.



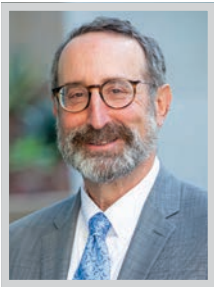
Experience that serves



Congratulations to Vivian Chow for being selected as one of *Los Angeles Business Journal’s* **Leaders of Influence: Wealth Managers**. U.S. Bank Private Wealth Management proudly recognizes your talent, leadership and contribution to our industry. Vivian, you inspire us all!

Vivian Chow
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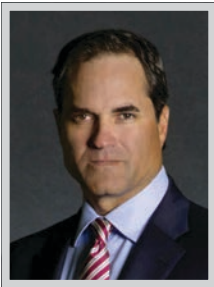
RICHARD JONES
Managing Director; Private Wealth Advisor
Merrill Private Wealth Management

When Richard Jones graduated from Boston University he had a Russian literature degree and banking was the last thing on his mind. However, after a stint traveling with very little financial resources he decided to go to graduate school. In 1980, after obtaining a master's degree in International Finance from Columbia University he found his calling in a career that combined building personal relationships, helping simplify people's lives and investing. So, for the past 41 years Jones has been providing highly tailored investment advisory and private banking services to high net worth individuals, foundations and endowments. After tenures at JP Morgan and Bank of America, Jones joined forces with Reza Zafari, Jerry Klein and Tom Tournat and joined Merrill Lynch. As one of the founding members of the Jones Zafari Group, he has built one of the largest private wealth management teams in the US overseeing over \$22 billion in assets.



MICHELLE KATZEN
Managing Director
HCR Wealth Advisors

Michelle Katzen has over a decade of experience in the financial services industry. Prior to joining HCR, she served as an interest rate derivatives trader at Union Bank and as a financial advisor at UBS. She was also a capital markets specialist at Toyota Financial Services, where she was on the groundbreaking team who was responsible for issuing the world's first green bond in 2014. The \$1.75 billion bond's net proceeds were used to finance new Toyota and Lexus gas-electric hybrid vehicles and various other green initiatives. After developing her remarkable track record in socially responsible investments, Katzen has brought that expertise to HCR Wealth Advisors, and has helped to increase the amount of alternative investments we use for client portfolios. She continues to keep her finger on the pulse of relevant financial trends and educates herself and the team on emerging issues.



JOHN KRAMBEER
Founder and Partner
Camden Capital

John Krambeer founded Camden Capital in 2004 and is a partner of the firm and the chairman of Camden Capital's investment strategy team, where he oversees the investment management process, including manager selection and review. Krambeer has extensive experience in providing wealthy families with strategic investment advice, including portfolio design and creation along with oversight of investment partnerships. Krambeer has spent his career working with both traditional and alternative investment managers, evaluating asset allocation strategies, managing long-term equity portfolios and implementing options strategies for large concentrated stock positions. Krambeer is a member of the advisory boards of FrontRange Capital Partners, Saybrook Fund Advisors and NewRoad Capital Partners. He's also an inaugural member of the Schwab Institutional Advisory Council for Advisors Turning Independent – a sounding board for firms transitioning to independence in the wealth management industry. He continues to lead the firm as the chairman of Camden Capital's investment strategy team.



GREGORY KUSHNER
Chairman and Founder
Lido Advisors

Gregory Kushner founded Lido Advisors, LLC in 1999 with the goal of ensuring that his clients are "fiscally fit," with a healthy financial portfolio in all areas of their lives. Besides his responsibilities as chairman and founder, Kushner still devotes much of his time to overseeing all investments and strategy for many ultra-high net-worth investors and family offices to provide objective, personal financial solutions and multi-generational planning. He led the firm to again be listed among the top 20 fastest growing wealth management firms in the United States according to RIA Magazine, growing the firm from \$1.594 billion AUM at the end of 2017 to over \$9.26 billion of AUM by May 2021. Part of this growth can certainly be attributed to the utilization of many investment strategies typically only available to the wealthiest families in America.



It takes hard work, tenacity and passion to become the kind of leader others want to follow.

Acacia Wealth Advisors is honored to congratulate Alev Lewis, Managing Director and Partner, on being named one of Los Angeles Business Journal's 2021 Leaders of Influence: Wealth Managers.

Alev's entrepreneurial mindset, team spirit, and dedication to her clients and philanthropy make her a true leader in both our industry and community.



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LEADERS OF INFLUENCE: WEALTH MANAGERS



AMY LANGE

Managing Director/Portfolio Manager
Covington Capital Management

As a portfolio manager at Covington Capital Management, Amy E. Lange enjoys serving a diverse client base from female heads of household to multi-generational families and private foundations. In addition to providing wealth management services, such as financial planning, tax planning and estate planning, she serves on the investment committee as director of fixed income, leading a team that manages all of the fixed income assets at Covington. Lange is one of seven women shareholders at the firm and serves on the Board of Directors. She is a Chartered Financial Analyst charterholder and holds the Certified Financial Planner certification. Lange has over 25 years of research, portfolio management, and wealth management experience. It has always been a commitment of hers to give back to the community in which she lives and works and especially has an affinity for mentoring and empowering girls and women.



ALEV LEWIS

Managing Director, Partner
Acacia Wealth Advisors at Hightower

Alev Lewis is a managing director, partner and co-founder of Acacia Wealth Advisors, an independent multi-family office. She has more than 30 years of experience in accounting, investment, financial and tax planning. Lewis delivers comprehensive, sophisticated wealth management advice to a diverse group of clients, including business owners, entrepreneurs, ultra-high-net-worth individuals and their families. She is passionate about working with clients whose lives, and thus, finances are generally complex. She takes the time to understand her clients' unique needs and helps them crystallize and achieve their financial objectives. Her multi-disciplinary background allows her to deliver integrated advice in the areas of financial, investment, tax and philanthropic planning. As a fiduciary, she always put clients' interests first. Because of that, she has enjoyed long-term relationships with her clients that span several decades.



EDWARD MOYZES

Chief Executive Officer
Strategic View Advisors

Edward Moyzes was born in Kiev before the fall of the Soviet Union, eventually immigrating to Denver with his family when he was five. He attended Denver University, where he earned his Master of Accountancy. After spending time at Big Four public accounting firms and a dot com start up, he decided he wanted greater control over his professional future and started his career as a financial advisor. Originally a solo advisor, Moyzes was a leader among his peers from day one, finishing first in the country among new advisors during three of his first four years. As his practice grew, he saw an opportunity to expand his impact beyond his own ability to meet with clients, and over the last six years, his team, Strategic View Advisors, has more than doubled from five to twelve team members, including seven Certified Financial Planners.



DEGA NALAYEH

Managing Director Private Client Advisor
Bank of America Private Bank

Dega Nalayah is a managing director and private client advisor with Bank of America Private Bank in Los Angeles. She has been with Bank of America for 24 years. She currently oversees approximately \$5.6 billion in client balances. She has been ranked the top wealth management performer for Bank of America Private Bank consistently for the last 14 years. With more than two decades of experience managing complex and strategic relationships, Nalayah helps successful entrepreneurs, business owners, and their families, who have created their wealth in the media technology, healthcare, real estate, and sports and entertainment industries, navigating the complexities that accompanies significant wealth. To aid her in addressing clients' often-dynamic situations, she leads a dedicated team of specialists with deep experience in specialized credit and lending solutions, wealth management, trust and estate planning services, risk management, and philanthropic opportunities.



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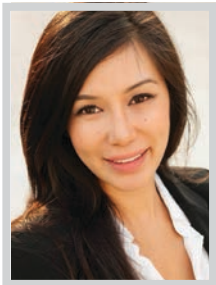


Richard Azarloza, CFA, CFP®



Amy E. Lange, CFA, CFP®

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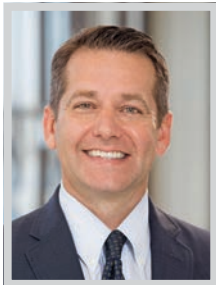
MICHELLE NGUYEN
Managing Director
First Foundation Advisors

Michelle Nguyen excelled in finance since she was a toddler. Not a surprise she is now responsible for developing and managing investment portfolios for high net worth individuals, families, and endowment funds. As a Certified Financial Planner since 2009, Nguyen specializes in working with affluent families and their advisors, to identify and attain their financial, tax, legacy, and philanthropic goals, while managing their balance sheet through investment management and asset allocation strategies. She is one of the top performers within First Foundation, bringing a fresh perspective to the wealth management industry. As an active member in her community, Nguyen is president of the LA Estate Planning Council, Executive Committee member of the Los Angeles LGBT Center Young Professionals Council and formerly, the USC Board of Governors.



JASON OZUR
Chief Executive Officer
Lido Advisors

Jason Ozur is the chief executive officer at Lido Advisors. In this role, he provides guidance and strategic vision for the firm as well as having key roles on many of the firm's committees, including its investment committee. Ozur's efforts have resulted in continuous growth in assets and employees since he took a leadership role with the firm. His talent for scrutinizing investments such as real estate, hedge funds, and other alternative investment strategies in today's volatile market, has made him an integral part of the Lido team and a valuable resource for his clients. Ozur takes on a mentorship role by helping the firm facilitate a company culture that is immersed in progression, excellence, and integrity. He has overseen the firm's M&A efforts which brought in more than \$1 billion in assets just last year.



BRIAN PARKER
Co-Founder and Managing Director
EP Wealth Advisors

Brian E. Parker, is a managing director and co-founder of EP Wealth Advisors. Parker has been a highly successful wealth manager for 22 years, specializing in comprehensive investment, tax, estate and retirement strategies for his clients. In addition, he has been a featured speaker at universities, corporations, and to affluent individuals throughout Southern California. He is respected by his peers and is currently serving as a member of advisory boards for TD Ameritrade and Charles Schwab. Parker leads through the firm's core values which he helped established: integrity, entrepreneurialism, excellence, and community. He has been an advocate for the EP Wealth's women's initiative and financial literacy initiative. His passion for creating a unique and personalized experience for both clients and employees motivates his team to excel. Parker also gives back to his community and is active with several charities including the Beach Cities Health District's Finance Committee.



ERIK RIDGLEY
CEO & Chief Investment Officer
Salem Partners Wealth Management

Erik Ridgley is CEO & chief investment officer of Salem Partners Wealth Management, a fiduciary and fee-only SEC-registered investment adviser firm that combines institutional expertise in public markets and private investments with personalized financial planning and customized portfolios to protect and grow the wealth of Salem's clients. In 2020, Ridgley navigated his clients through the pandemic-induced market sell-off and recovery by continuing to patiently invest for the long-term per each client's custom investment policy statement. As long-term investors, he and his clients have committed themselves to adhere to well-defined investment policy statements, which have been custom-built for each individual client, to achieve their long-term investment objectives, while accepting the inevitable price fluctuations of the public markets. During 2020 and early 2021, Ridgley led his firm's efforts to expand its profile amongst complementary centers of influence and the community of ultra-high net worth families and business owners.



We congratulate
Dega Nalayah
Managing Director, Private Client Advisor

for being recognized among the elite
2021 Leaders of Influence: Wealth Managers
by the Los Angeles Business Journal.

We salute your passion for helping to improve the financial lives of your Private Bank clients, as well as your leadership, community engagement and commitment to diversity.

LEADERS OF INFLUENCE: WEALTH MANAGERS



REBECCA ROTHSTEIN
Managing Director
Merrill Private Wealth Management

Rebecca Rothstein, managing director of Merrill Private Wealth Management, began her career in financial services in 1987 and brought her team to Merrill Lynch in 2012. She focuses on helping high-net-worth individuals, families and institutions pursue their financial goals through wealth management and tax minimization strategies and legacy planning services. She also works with corporate officers, developing liquidity and diversification strategies for concentrated stock positions. Barron's has named Rothstein as one of the top 100 women financial advisors in America every year since it began in 2006, with the exception of 2013, when she moved from Morgan Stanley to Merrill Lynch. Rothstein is a founding member and chairwoman of the board of Daltrey/Townshend Teen Cancer America. She is also a member of the board of the Early Childhood Partial Hospitalization Program at UCLA, which helps children who have been diagnosed with autism, developmental disabilities and behavior disorders.



ERIC TASLITZ
Principal
Avitas Wealth Management

Eric Taslitz began his career as a financial advisor at Merrill Lynch in 1996 and joined his current partners in 1998. He and his partners started Avitas Wealth Management, their independent registered investment advisor firm, in November of 2017. Avitas manages investment assets directly, eliminating intermediaries, providing clients with accountability, complete transparency, and a direct relationship with their asset manager. Taslitz's strength is forging long and trusting relationships. This is the basis for providing the best advice for every client in each specific situation. Among his clients are C suite executives, entrepreneurs, entertainment industry members, and corporate attorneys. He gets the most satisfaction from substantive complex conversations with clients that lead to actionable insight and real results. Taslitz and his colleagues at Avitas are particularly skillful in catering to the complex needs of multi-generational families, including parents, their children, and grandchildren.



MARK UDIS
Partner
Camden Capital

Mark Udis is a partner of Camden Capital and joined the firm in 2005. Udis focuses on individuals and families of significant financial resources and is actively involved in the firm's family office practice. Udis' client base is made up of technology entrepreneurs and executives, professional athletes, attorneys, doctors, and affluent families. He is based out of Camden Capital's newest office in Manhattan Beach. As a member of Camden Capital's investment strategy team, he is actively involved in portfolio management and manager selection. Udis focuses on building a unique and comprehensive portfolio for his clients based on an analysis of their current financial situations and long-term goals. His financial strategies are tailored to be able to adapt with both market fluctuations and lifestyle changes. Udis helps to diversify his client portfolios by introducing opportunities to qualified clients that are outside of traditional investment opportunities.



JAMES VERZINO
Managing Director, Wealth Management Advisor
Northwestern Mutual

When a childhood friend introduced him to Northwestern Mutual, Verzino discovered a place where he could truly lead and inspire people. Nearly a decade later, he has developed and influenced dozens of new financial advisors, while maintaining a successful practice. As a wealth management advisor, Verzino has impacted the lives of hundreds of clients, striving to build lasting bonds and human connection in a world of uncertainty. As a leader and managing director of Northwestern Mutual's downtown Los Angeles office, he upholds the highest standards of success within the largest district office in the country. He often partners with affluent families, small business owners, entertainment professionals, and successful attorneys to help steer them toward financial success. Adhering to the "power of now" philosophy, he helps his clients plan for tomorrow, so they can spend their lives living for today.



Congratulations to our friends and colleagues, **Edward Moyzes, David Clausen, and James Verzino**, for being selected among the "**Leaders of Influence**" in Los Angeles

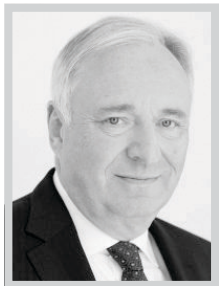
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LEADERS OF INFLUENCE: WEALTH MANAGERS



ROGER WACKER

Managing Director, Senior Portfolio Manager,
Private Wealth Advisor
UBS Private Wealth Management

Roger Wacker is a Los Angeles-based private wealth advisor who draws upon his vast experience of over 44 years, working across the globe. He is part of a team at UBS Private Wealth Management recognized as one of the Top 50 Private Wealth Advisory Teams by Barron's. Born in Switzerland, Wacker began his UBS career at the firm's Zurich headquarters in 1976. He moved to Los Angeles in 1989, where he managed the West Coast Region for nearly a decade. After serving as co-head of Bank Julius Baer North America, vice chairman of UBS Private Bank, and managing director and senior relationship manager at Credit Suisse, he rejoined UBS in 2015. Currently, Wacker and his team work closely with ultra-high net worth entrepreneurs, families and foundations to develop investment and succession strategies tailored to their needs, serving clients around the world, with a focus on Southern California.



ALYSSA WEINBERGER

Senior Managing Director
Lido Advisors

Alyssa Weinberger is a third generation CPA who started her career at Rothstein Kass & Co. (now KPMG). She joined Lido Advisors, LLC in 2004 and became a CFP in 2005. Working in a male dominated industry, Weinberger became the first female partner of Lido Advisors. She successfully ran the Operations and Marketing team, leading to her current role as senior managing director. In addition to her executive position at Lido Advisors, Weinberger also serves as senior managing director of Lido Consulting, Inc. and co-founder of Oakhurst Advisors, LLC. At Lido, she has led the firm's growth from \$1.594 billion AUM at the end of 2017 to over \$9.26 billion of AUM by May 2021. Passionate when it comes to curating relationships and connecting the right people, Weinberger has a demonstrated knack for networking, locally and nationally.



STEVE WEINBERGER

Senior Managing Director
HCR Wealth Advisors

After graduating with his MBA from Pepperdine with an emphasis in finance, Steve Weinberger joined HCR Wealth Advisors in 1998. While initially a boutique firm, HCR has grown to over \$1 billion in assets under management largely in part due to Weinberger's leadership and efforts. With over 20 years of experience in the financial services industry, Weinberger specializes in helping clients develop personalized investment portfolio strategies that are continuously monitored and geared toward navigating the markets. Because we do not live in a "one size fits all" world, each plan and strategy that Weinberger presents is unique to each client's needs for that particular time in their life. HCR Wealth Advisors has employed this strategy since its inception, and it works. Weinberger is particularly skilled at working with clients who are navigating life transitions such as retirement, selling a business and widowhood.



Congratulations to our friends and colleagues, **JASON OZUR, ALYSSA WEINBERGER, and GREG KUSHNER**, for being selected among the "LEADERS OF INFLUENCE" in Los Angeles



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*Inactive