

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. The professionals were chosen based on a demonstration of impact made on the profession and on the Los Angeles community.

LEADERS OF INFLUENCE: WEALTH MANAGERS

**DAVID AJEMIAN**

Managing Director; Private Client Advisor
Bank of America Private Bank

David Ajemian is a seasoned wealth management leader whose more than 30-year career reflects trusted client relationships and sustained excellence in advising high-net-worth individuals and families.

Ajemian leads a multidisciplinary team of 10 individuals delivering highly customized wealth strategies for complex client needs in investment management, trust and estate planning services, liquidity-event strategies, lending and philanthropy. Ajemian and his partner Nancy Neal have built and managed a half-billion dollars in assets under management since joining BofA last year. Throughout his career, Ajemian has demonstrated a rare ability to integrate investment management, trust and estate planning, liquidity-event strategies, credit and lending, and philanthropic planning into long-term solutions to fit his clients' needs.

**MIKE ALVES**

Managing Director; Founder;
Fund Manager

VIDA Vision Fund and
VIDA Private Wealth

As founder and managing director of VIDA Private Wealth and architect of the VIDA Vision Fund, Mike Alves has created a firm that combines traditional wealth management with direct access to private market investments in AI, robotics, and space technology.

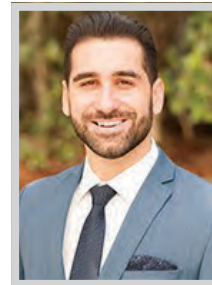
Before founding VIDA in 2019, Alves spent nearly 13 years at Morgan Stanley and Merrill Lynch, building a reputation for forward-thinking financial planning and deep client relationships. That foundation prepared him to launch VIDA with a clear mission: helping clients align their wealth with their values while getting them into the deals that actually matter. The past 12 months have been a breakout period for Alves and VIDA, in which he launched the VIDA Vision Fund.

**MIKE AMASH**

Partner; President
Westmount Partners

Mike Amash has distinguished himself as a trusted advisor among his clients and a respected leader behind the scenes. He has also played an important role in facilitating Westmount's transformation from a small independent advisor managing \$250 million in assets to one of Los Angeles' pre-eminent advisory firms overseeing over \$6.8 billion by the end of 2025.

Amash has instituted many initiatives to further enhance client service and retention, as well as strengthen the firm's internal company culture. Amash also continues to work directly with clients, including some of the firm's largest and longest-standing relationships. As one of the chief architects of Westmount's growth strategy, Amash's unique perspective and influence are evident in nearly every aspect of the business.

**SHYAN M. ARDALAN**

Managing Director; Senior Wealth Advisor
Merrill Lynch

Shyan Ardalan is a principal with The Ardalan Wealth Management Group and a highly respected advisor to affluent individuals and families across Southern California. He serves a client base that includes successful business owners and entrepreneurs, senior executives at public and private companies, entertainment industry professionals, and a select group of professional athletes. His work focuses on clients whose complex financial lives require advanced planning, coordination, and long-term strategic guidance.

With deep roots in commercial banking, Ardalan brings a strong understanding of middle-market businesses and the financial needs of executive leadership teams to his clients. This background enables him to deliver integrated wealth strategies that address both personal and business goals.

**MICHAEL BAKER**

Managing Partner
Gerber Kawasaki Wealth and
Investment Management

In 2026, Mike Baker, CFP, was named as the most recent managing partner at Gerber Kawasaki Wealth and Investment Management, where he leads the firm's recruiting and training division for new financial advisors. In this capacity, Baker has developed in-depth onboarding programs and mentors advisors at all experience levels, helping them integrate into the firm's collaborative culture while building successful practices.

Baker provides comprehensive financial planning and wealth management to high-net-worth clients, including entrepreneurs, industry leaders, and young families who value his proactive service and dedication to helping them achieve their financial goals. His empathy, attention to detail, and superior listening skills consistently resonate with clients navigating complex financial decisions.

**PATRICE BENING**

Wealth Advisor
Morton Wealth

Patrice Bening is one of the curators of 'herself by mor-ton,' an educational platform focused on women investors. Through 'herself,' she aims to create a space that encourages women to talk about wealth, get curious about money habits, share their stories, and have access to professional support and resources. Over the years, herself has hosted a combination of in-person and hybrid events focused on fostering community. For 2025, she and the 'herself' team have planned a series of lunch and learns focused on various aspects of investing, emphasizing income, growth, and how to analyze risk.

One of the main reasons 'herself' started is because of Bening's personal mission to disrupt the narrative the industry casts when it comes to providing support and empowerment to women who seek financial advice.

**DARNEL BENTZ**

Senior Wealth Advisor
Kayne Anderson Rudnick

Darnel Bentz is a senior wealth advisor at Kayne Anderson Rudnick (KAR), where he provides sophisticated wealth management solutions for high-net-worth clients and brings 26 years of industry experience.

Bentz focuses on delivering customized financial plans and portfolios integrating both traditional and alternative investment strategies. His advocacy for alternative investments influenced firm-level offerings and ensured that his clients have access to a diverse range of solutions aligned with their financial objectives. He has continued to meaningfully grow his practice, securing approximately \$82 million in new assets over the last two years, highlighted by a \$35 million new relationship with a nonprofit organization in 2025, while maintaining a 96% client retention rate.

**JIM BERLINER**

Founder; Chairman
Westmount Partners

Jim Berliner is a co-founder of Westmount Partners, currently serving in the role of chairman. Under his leadership, Westmount has grown into one of Southern California's premier wealth management firms, managing more than \$6.8 billion in assets.

Berliner's influence on Westmount's growth and success over the years is undeniable. In his previous role as president, he helped Westmount distinguish itself in several unique ways—perhaps most notably as an expert in alternative asset classes that typically move out of sync with the traditional stock and bond markets. Westmount has implemented this allocation using both publicly traded and private investments, as well as by making tactical moves into undervalued assets. Berliner's compassionate and consistent leadership has put Westmount in a strong position for 2026.

**SASHA BOGUNOVIC**

Senior Vice President; Relationship Strategist
PNC Bank

Sasha Bogunovic is a senior relationship strategist recognized for solving the most complex balance sheet challenges facing ultra-high net worth families—particularly where liquidity needs, custom credit design, and sophisticated estate planning intersect. He is known for combining capital markets fluency with a disciplined credit methodology that protects long-term wealth while enabling timely access to liquidity.

In parallel, Bogunovic also plays a pivotal role in coordinating the buildout of one of the most complex estate structures in his book, working in concert with trust and estate counsel, wealth strategists, and specialists to ensure the plan served both legacy and control goals for the next generation. This combination is a hallmark of Bogunovic's value and a key reason he stands out in his field.

**MIKE CANNONE**

Partner; Managing Director
Westmount Partners

Since joining Westmount, Mike Cannone has established himself as a leader both inside and outside the firm, guiding the marketing and business growth strategies and serving on the boards of numerous nonprofit organizations across Los Angeles.

Cannone has been directly responsible for originating nearly \$750 million in new client assets, as well as for accelerating the pace of assets under management growth at the firm, hiring additional team members, implementing mentorship programs, expanding the firm's business development and marketing efforts, and broadening its geographic footprint. Over Cannone's tenure, the firm's AUM has more than tripled, now over \$6.8 billion. Cannone architected Westmount's Growth Team, which encompasses both marketing and sales roles.

LEADERS OF INFLUENCE: WEALTH MANAGERS

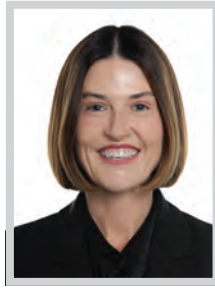


CORY CHAPMAN

CEO; Founder
EFC Wealth Management Firm, LLC

Cory Chapman's career is defined by sustained excellence, innovation, and an unwavering commitment to improving the financial lives of the families he serves. With over 30 years in the financial services industry, Chapman is the founder and CEO of EFC Wealth Management, a firm built on the belief that comprehensive planning, education and trust are the cornerstones of lasting financial success.

One of Chapman's most significant accomplishments is the creation and scaling of EFC Wealth Management, recognized for its client-first philosophy and long-term approach to retirement planning. Under his leadership, the firm has consistently achieved strong, sustainable growth—maintaining an average of approximately 30% year-over-year growth, with the current year on pace to reach 36%.



BRIDGET COSTELLO

Wealth Advisor
Kayne Anderson Rudnick

Maintaining a client retention rate of 98%, Bridget Costello is a wealth advisor whose 18 years of experience in the investment management industry have helped refine the client service experience and create the foundation for success at Kayne Anderson Rudnick (KAR). As a member of the KAR Wealth Advisor Team, Costello has been recognized for substantial contributions that have earned her team a Top 10 spot among Barron's Top 100 Independent Advisors.

Costello's approach to wealth management concentrates on the quality of her client relationships. She honors the delicate process of earning clients' trust and relishes her ability to provide them with the financial peace of mind they need for major transitions in life such as marriage, childbirth and retirement.



HATEM DHIAB

Managing Partner; Founding Partner
Gerber Kawasaki Wealth and Investment Management

Hatem Dhiab is a founding and managing partner at Gerber Kawasaki Wealth and Investment Management, with a unique story that enables him to appeal to clients from diverse backgrounds. Raised in a racially mixed family of bankers in Tunisia and France, Dhiab learned to be adaptable, self-reliant, and responsible at an early age. In 2025, Dhiab was named Gerber Kawasaki's Top Advisor, Top Advisor AUM, and Top Risk Manager.

Dhiab's success is a testament to his ability to listen, understand his client's needs, help them clarify their financial goals, and implement a dominant plan of action. His knowledge of advanced strategization techniques and complex tax proposals allow him to understand the bigger picture and coordinate with his client's team of professionals.



MATTHEW FOURNIER

Wealth Partner; Managing Director
J.P. Morgan Wealth Management

As a managing director and wealth partner with The Fournier Group, Matthew Fournier actively manages over \$1.3 billion in client assets, working with entertainers, entrepreneurs and athletes, among many others.

Over the past five years, the team's fixed income accounts have outperformed a number of benchmarks after realized fees. Looking forward, Fournier's goals continue to be to help clients define and exceed their financial objectives, while delivering risk-adjusted returns that outperform existing benchmarks. Fournier also helped start GovInvest, a technology company whose mission is to help governments solve their biggest problems. The software is used by over 1000 governments. GovInvest was previously named a GovTech 100 Company.



BRIAN HOLMES

President; CEO
Signature Estate & Investment Advisors, LLC (SEIA)

Brian D. Holmes, MS, CFP, AIF is the president and CEO of SEIA. 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. Brian has been in the investment management business for over 35 years, maintaining a successful independent private practice with his team for over 300 clients.

Holmes was named to the Barron's Hall of Fame in 2019, as one of 145 advisors nationwide. Each member of the Hall of Fame has appeared in ten or more Barron's Top 100 Advisor Rankings. He is the only advisor from Los Angeles and Orange Counties to make the elite Barron's Top 100 Independent Advisors from 2008-2018.

Merrill congratulates Richard B. Jones.




Richard B Jones

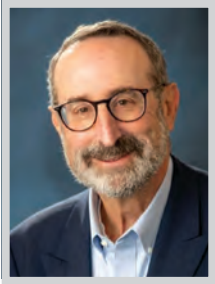
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LEADERS OF INFLUENCE: WEALTH MANAGERS

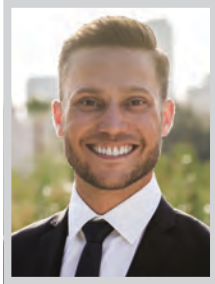


RICHARD B. JONES

Managing Director;
Private Wealth Advisor
Merrill Private Wealth Management

Richard B. Jones' extraordinary career spans more than four decades and reflects a rare combination of intellectual depth, financial acumen, and unwavering dedication to his clients and community.

Since entering the industry in the 1980s, Jones has served high net worth individuals, foundations and endowments with distinction. As cofounder of the Jones Zafari Group, he helped grow the business from \$500 million to more than \$100 billion in assets, leading a team that serves ultra-high net worth households with an average net worth of \$75 million. His disciplined investment perspective often challenges conventional market assumptions, emphasizing thoughtful long term strategy across equities, fixed income, alternatives, and multigenerational planning.

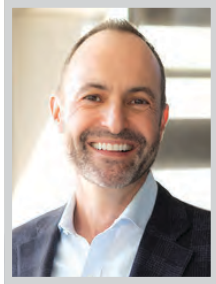


MARK MASLIAH

Wealth Management Advisor
Northwestern Mutual

Mark Masliah is a distinguished financial advisor with Northwestern Mutual, providing comprehensive, personalized financial solutions for young professionals, high-net-worth families, businesses, and institutions. With deep industry expertise and a thoughtful, client-centered approach, Masliah helps individuals and organizations build, protect, and preserve wealth through every stage of life.

As a wealth management advisor, Masliah specializes in asset accumulation strategies and highly customized financial planning. His clients span the entertainment, technology, and real estate sectors, and benefit from his ability to navigate complex financial landscapes with clarity and precision. Masliah holds real estate, life and health, Series 6, 63, and 7 licenses.



EDWARD MOYZES

CEO
Strategic View Advisors

Edward Moyzes' decades-long record of exceptional client service and sustained success is rooted in a rare combination of commitment to excellence, an instinct for building strong teams, and a deeply genuine care for the people he serves.

Moyzes has distinguished himself as a leader among his peers. During three of his first four years, he finished first in the country among new advisors. As his practice grew, he recognized an opportunity to expand his impact. Over the past five years, Strategic View Advisors has more than doubled its number of employees, growing from 11 to 24 team members. Rather than focusing solely on portfolios, distribution strategies, or succession plans, Moyzes specializes in integrating these components into a cohesive, highly personalized financial roadmap.

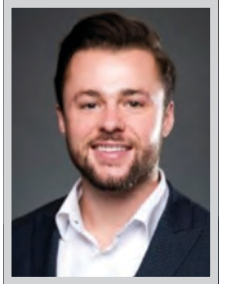


NANCY NEAL

Managing Director; Private Client Advisor
Bank of America Private Bank

Nancy Neal is a tenured leader in private wealth management with more than 30 years of experience advising ultra-high-net-worth individuals, multi-generational families, and family offices. As a managing director and private client advisor with Bank of America Private Bank in Beverly Hills, Neal delivers highly customized, comprehensive wealth strategies that help clients preserve, grow and transition complex portfolios across generations.

Neal leads a multidisciplinary team of 10 specialists who integrate banking, investment management, trust and estate planning, liquidity-event planning, lending and philanthropy to address the full spectrum of her clients' financial needs. Throughout her career, Neal has built a reputation as a trusted advisor to family offices and ultra-high-net-worth clients.



CHRIS O'BOOK

Vice President; Senior Relationship Strategist
PNC Bank

Over his 14-year career in banking, including more than a decade serving clients in Los Angeles, Chris O'Book has distinguished himself by building one of the region's most trusted and influential professional networks by blending personal relationships with business leadership.

At PNC, O'Book helped establish and expand the Private Bank in a highly competitive market. O'Book consistently positions PNC as a comprehensive, one-stop partner and integrates wealth management, lending, credit, and treasury solutions into customized strategies that address a client's full financial picture. His ability to provide boutique-level service backed by the resources and stability of a national institution has allowed him to meet the needs of clients who want both sophistication and personal attention.

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LEADERS OF INFLUENCE: WEALTH MANAGERS



BROMLEY PALAMOUNTAIN

Wealth Management Advisor
Northwestern Mutual

Bromley Palamountain stands out as a financial advisor whose personal journey, professional accomplishments, and unrelenting commitment to others make him an irreplaceable asset to his clients and community. With over 13 years of experience in the enterprise sector and a growing influence in the financial planning world, Palamountain has transformed adversity into advantage for his clients, community, and the next generation of wealth builders.

What sets Palamountain apart is not just his technical knowledge or years of experience; it's his unique ability to innovate. While many advisors offer conventional solutions, Palamountain brings fresh, strategic thinking and out-of-the-box methodologies tailored to each client's vision and values.

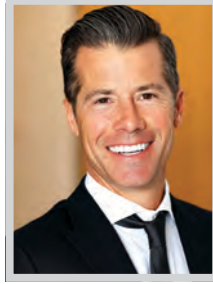


MIKE RUDOW

Wealth Advisor; Partner
Morton Wealth

Mike Rudow's career is marked by significant achievements, both within his role in Morton Wealth's Strategist offering for business owners and beyond. With The Strategist, Rudow has played a pivotal role in helping clients navigate business exits, particularly those who believed their businesses had little to no transferable value prior to engaging him. By guiding business owners through strategies to de-risk and decentralize themselves from their businesses, Rudow has helped owners create transferable enterprise value while aligning their business outcomes with their personal and financial goals. He transforms lifestyle businesses into valuable and transferable assets.

Rudow manages a large book of business, guiding clients toward achieving their financial aspirations.



JEFF RUNYAN

Chief Executive Founder; Owner
Runyan Capital

Jeff Runyan is the founder and chief executive officer of Runyan Capital, an independent wealth management firm he launched in 2010 with a clear vision: to build a disciplined, client-first advisory practice grounded in integrity, service and precision. Today, the firm oversees more than \$360 million in assets across over 800 client accounts, serving high-net-worth individuals, families, and business owners nationwide.

Runyan specializes in structuring and overseeing sophisticated investment portfolios for affluent individuals and families, with a strong emphasis on risk management, capital preservation, and long-term strategic asset allocation. His approach reflects a deep understanding of market cycles and the importance of discipline and consistency.



NAZIE SAFFARI-MOINI

Managing Director;
Senior Financial Advisor
Merrill Lynch

Nazie Saffari-Moini is a nationally recognized financial industry veteran, with Merrill Lynch for 35 years. Her focus is working with high-net-worth individuals and families, helping to navigate the complexities of managing significant wealth. In 2025 she exceeded \$1.5 billion in AUM.

Saffari-Moini's consultative approach and depth of experience allows her to deliver sound financial strategies to help her clients reach their financial goals. She approaches each client relationship fostering ongoing communication, delivering holistic advice and guidance that seeks to synthesize a client's investment goals, their values and generational considerations. Saffari-Moini's keen intuition, empathy, and ability to listen influences her daily interactions with her clients.



PRESTON SAM

Wealth Management Advisor
Meliora Wealth Management

Preston Sam stands out in the modern financial advisory landscape for his rare ability to pair technical excellence with a deeply human approach to wealth management. A CFP, ChFC, and RICP, Sam brings an exceptional blend of advanced credentials, real-world insight, and client-centered service that positions him as a trusted leader in banking and finance.

At the core of Sam's success is his ability to build and scale a sophisticated financial planning practice serving entrepreneurs, business owners, and high-net-worth individuals. As a co-leader at Meliora Wealth Management, a Northwestern Mutual-affiliated firm, he helps guide a high-performing team that delivers comprehensive, customized strategies designed to create, preserve and transfer wealth across generations.

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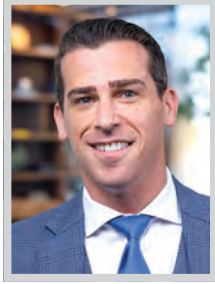
LEADERS OF INFLUENCE: WEALTH MANAGERS

**GABRIEL SHAHIN**

President; CEO
Falcon Wealth Planning

Gabriel Shahin, CFP, is the CEO and founder of Falcon Wealth Planning, an independent, fee-only registered investment advisory firm that has grown into one of the most education-driven and high-retention advisory platforms in the Western United States. Since entering the industry in 2003, Shahin has built a firm recognized for its disciplined growth, client-first culture and long-term approach to fiduciary advice.

Under Shahin's leadership, Falcon Wealth Planning has expanded organically into a nationally recognized RIA. As of June 30, 2025, the firm advises more than \$1.3 billion in client assets across 1,557 households. Over the past year, Falcon reported an estimated 46% growth in assets and 54% growth in revenue, with five-year annualized growth rates of 61% and 74%, respectively.

**AYAL SHMILOVICH**

Managing Partner; Founding Partner
Gerber Kawasaki Wealth and Investment Management

Ayal Shmilovich is a managing partner with Gerber Kawasaki Wealth and Investment Management. With an educational background in psychology, Shmilovich was fascinated by how emotions and relationships affected people's financial decisions and that many times, this got in the way of financial success. So, Shmilovich sought to help people overcome these biases and build a better future for themselves.

Shmilovich believes in creating very strong, meaningful relationships with all of his clients and helping them achieve all of their goals. He enjoys taking the time to get to know each of his clients, their families, goals and dreams. By getting to know each of his clients on a very personal level, Shmilovich can create a highly customized plan that fits their specific needs.

**MARK UDIS**

Partner
Certuity

Mark Udis is a partner of Certuity. He focuses on individuals and families of significant financial resources and is actively involved in the family office practice. He is an active member of Certuity's investment strategy team.

Udis' client base is made up of technology entrepreneurs and executives, business owners, professional athletes, attorneys, doctors and prominent families. Udis takes pride in establishing trusted and long-lasting relationships. He understands that clients rely on his expertise and guidance, and he is dedicated to providing a consistent and exceptional level of service. Udis believes that honesty, integrity and authenticity are the core of the client experience, and he strives to incorporate those values into everything he pursues.

**ALYSSA WEINBERGER**

Senior Managing Director;
Chief People Officer
Lido Advisors, LLC

Alyssa Weinberger is a third generation CPA who started her career at Rothstein Kass & Co. (now KPMG). Weinberger 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 and chief people officer. In addition to her executive position at Lido Advisors, Weinberger also serves as President of Lido Consulting Group, LLC.

Weinberger also created the Annual Family Office Investment Symposium, now in its 19th year, which is a national conference that brings together family office attendees to network with peers and learn best practices.

Smart Wealth Management Strategies for 2026

By **TIM MARTIN**

The wealth management landscape continues to evolve in 2026, shaped by economic uncertainty, technological innovation, shifting tax policies, and changing investment opportunities. For high-net-worth individuals, families, and business owners, staying proactive is essential. Financial advisors increasingly emphasize a strategic approach that blends disciplined investing with tax efficiency, diversification, and long-term planning.

Based on conversations with several experts in the space, here are several smart strategies that can help investors navigate the year ahead.

PRIORITIZE TAX EFFICIENCY

With potential changes to tax policy always on the horizon, tax efficiency remains a cornerstone of effective wealth management. Advisors suggest regularly reviewing portfolios to identify opportunities for tax-loss harvesting, strategic asset location, and charitable giving strategies. Donor-advised funds and charitable remainder trusts can allow investors to support causes they care about while potentially reducing taxable income. For business owners and entrepreneurs anticipating liquidity events, early tax planning can significantly impact how much wealth ultimately stays in the family.

DIVERSIFY BEYOND TRADITIONAL ASSETS

Stocks and bonds remain foundational to most portfolios, but many investors are looking beyond traditional asset classes to enhance diversification. Private equity, private credit, infrastructure investments, and venture capital continue to attract attention among affluent

investors seeking long-term growth opportunities. Real assets—including real estate, farmland, and energy infrastructure—may also serve as a hedge against inflation. The key, advisors say, is thoughtful allocation rather than chasing trends, ensuring that alternative investments complement rather than dominate a portfolio.

BALANCE LIQUIDITY AND LONG-TERM GROWTH

One lesson many investors have learned from recent market cycles is the importance of maintaining sufficient liquidity. While long-term investments drive wealth creation, having accessible capital allows investors to respond to opportunities or unexpected needs without disrupting their overall strategy. Advisors often recommend maintaining a liquidity "tier"—such as cash, short-term bonds, or money market funds—that can cover several months or even years of expenses depending on an investor's situation.

LEVERAGE TECHNOLOGY — BUT KEEP HUMAN GUIDANCE

Digital tools, AI-powered portfolio analytics, and automated financial platforms are playing a growing role in wealth management. These technologies can help investors track spending, monitor portfolio risk, and model potential outcomes



under different economic scenarios. However, most experts caution that technology works best when paired with human expertise. Experienced advisors can help interpret data, anticipate regulatory changes, and guide clients through complex decisions involving estate planning, tax strategy, and multigenerational wealth transfer.

PLAN FOR GENERATIONAL WEALTH TRANSFER

A historic transfer of wealth between generations is underway, making estate planning more important than ever. Families are increasingly discussing governance structures, trusts, and philanthropic goals earlier in the planning process. Advisors often recommend establishing clear communication among family members to help ensure that wealth is preserved and aligned with shared values. Structured family meetings, education for younger generations, and the creation of family mission statements are becoming more common tools for sustaining wealth across generations.

INTEGRATE PHILANTHROPY INTO FINANCIAL PLANNING

Philanthropy is no longer viewed as separate from wealth management—it is often integrated directly into financial planning strategies. Strategic giving can support both social impact and financial goals. Vehicles such as donor-advised funds, private foundations, and impact investment funds allow individuals to direct capital toward causes while maintaining flexibility and potential tax advantages. For many families, philanthropy also becomes a powerful way to engage younger generations in responsible stewardship of wealth.

FOCUS ON RISK MANAGEMENT

Finally, effective wealth management in 2026 requires careful attention to risk management. This includes reviewing insurance coverage, protecting against cybersecurity threats, and ensuring that portfolios are resilient in different economic environments. Stress-testing investments against inflation, interest-rate changes, and market volatility can help investors stay prepared for uncertainty.

In an increasingly complex financial environment, the most successful wealth management strategies tend to be those that remain disciplined, diversified, and adaptable. By focusing on tax efficiency, thoughtful diversification, long-term planning, and proactive risk management, investors can position themselves not just to preserve wealth—but to grow and protect it for years to come.

Tim Martin is a freelance writer who focuses on financial topics.

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