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MONEY MANAGEMENT FIRMS

Valley area firms ranked by assets managed as of Dec 31, 2023

Rank	Firm • name • address • website	Assets Under Management • 2023 • 2022 (in millions)	Number of Employees • portfolio managers • researchers	Profile • headquarters • client contact(s)	Chief Investment Officer • name • phone	
1	 SageView Advisory Group 3075 Townsgate Rd., Suite 180 Westlake Village 91361; sageviewadvisory.com	\$156,399¹ \$156,399 ¹	50 10	Newport Beach Christy Quintero	Matt Cosgriff (805) 418-4565	
2	 One Capital Management 3075 Townsgate Rd., Suite 350 Westlake Village 91361; onecapital.com	6,043 4,941 ¹	10 10	Westlake Village Patrick Bowen	Steven Cowley (805) 409-8150	
3	 Morton Wealth 27200 Agoura Rd., Suite 200 Calabasas 91301; mortonwealth.com	2,600 2,378 ¹	47 6	Calabasas Jeff Sarti	Meghan Pinchuk (818) 222-4727	
4	 PennyMac Mortgage Investment Trust 3043 Townsgate Rd. Westlake Village 91361; pennymac.com	2,000 13,922 ¹	120 25	Westlake Village	William Chang (818) 224-7028	
5	 SteelPeak Wealth 21650 Oxnard St., Suite 2300 Woodland Hills 91367; steelpeakwealth.com	1,900 1,893 ¹	25 15	Woodland Hills Reza Zamani	Maziar Esmailbeigi (818) 835-8720	
6	 Hearthstone Inc. 23975 Park Sorrento, Suite 220 Calabasas 91302; hearthstone.com	1,800 1,800	10 6	Calabasas Cindy Gilmore	Mark Porath (818) 385-0005	
7	 HBW Advisory Services 3355 Cochran St., Suite 100 Simi Valley 93063; myhbwadvisor.com	1,100 1,020 ¹	8	Simi Valley Mike Linder	Joseph Bonanno (800) 473-3856	
8	 Singer Burke 6345 Balboa Blvd., Suite 375 Encino 91316; singerburke.com	978 983 ¹	23 8	Encino	Richard Singer (818) 774-1000	
9	 Tamar Securities 22466 Ventura Blvd. Woodland Hills 91364; tamarsecurities.com	874 874 ¹	12 3	Woodland Hills Daniel Itzhaki	Amit Stavinsky (818) 914-7460	
10	 Wescap Group 330 N. Brand Blvd., Suite 1150 Glendale 91203; wescapgroup.com	850 850 ¹	5	Glendale Rick Weinlein	Joel Edstrom (818) 563-5170	
11	 Manchester Financial Inc. 2815 Townsgate Rd., Suite 100 Westlake Village 91361; manchesterfinancial.com	798 798 ¹	11 4	Westlake Village Cindy Randolph	Robert Katch (805) 495-4405	
12	 Wealth Collaborative Inc. 30699 Russell Ranch Rd., Suite 185 Westlake Village 91362; thewealthcollaborative.com	656 656 ¹	4	Westlake Village Kristine Wallington	Jeff Robinson (818) 577-1180	
13	 Pacific Global Investment Management Co. 101 N. Brand Blvd., Suite 1950 Glendale 91203; pacificglobal.us	638 638 ¹	6 2	Glendale Laila Poveda	George Henning (818) 242-6693	
14	 De Groot Financial Group 3013 Willow Ln. Thousand Oaks 91361; degrootefinancial.com	583 583 ¹	2	Westlake Village Doug De Groot	Doug De Groot (805) 230-0111	
15	 Alliance Advisory & Securities Inc. 31248 E. Oak Crest Dr., Suite 100 Westlake Village 91361; allianceadvisory.com	454 454 ¹	4 4	Westlake Village Jeff Garagliano	Randall Sanada (805) 371-8020	
16	 Cruden Bay Investment Management 2945 Townsgate Rd., Suite 200 Westlake Village 91361; cbayinvestments.com	441 441 ¹	3 2	Westlake Village Jonathan Herson	Selwyn Herson (805) 267-7184	
17	 FMB Wealth Management 100 N. Westlake Blvd., Suite 201 Westlake Village 91362; fmbwealth.com	405 405 ¹	6 6	Westlake Village Amy Schuster	Danny Mock (805) 446-4494	
18	 West Oak Capital 2801 Townsgate Rd., Suite 112 Westlake Village 91361; westoakcap.com	383 403 ¹	3	Westlake Village Byron Snider	Byron Snider (805) 230-8282	
19	 Bernzott Capital Advisors 1200 Paseo Camarillo, Suite 180 Camarillo 93010; bcalfunds.com	311 NA	3 3	Austin, Texas Mark Scott Kevin Bernzott	Mark Scott (805) 856-2646	
20	 Planned Asset Management 27001 Agoura Rd., Suite 150 Calabasas 91301; earn4u.com	284 284 ¹	3 3	Calabasas Audrey Witt	Morrie Reiff (818) 708-6888	
21	 California Capital Management 2520 W. Olive Ave., Suite 300 Burbank 91505; calcapmgt.com	260 260 ¹	4 2	North Hollywood Scott Hemmann	Gregory Zedlar (818) 766-0660	
22	 GKV Capital Management Co. Inc. 299 W. Hillcrest Dr., Suite 119 Thousand Oaks 91360; gkvcapital.com	231 231 ¹	NA	Thousand Oaks Greg Vogel	Peter Vogel (805) 497-2616	
23	 NBS Financial Services Inc. 340 N. Westlake Blvd., Suite 112 Westlake Village 91362; nbscompanies.com	225 225 ¹	3 1	Westlake Village Joseph Brooks	Geordie Crossan (805) 497-2497	

¹ Financial information from Securities and Exchange Commission filings.
Note: Information for this list was collected from sources including company representatives, Securities and Exchange Commission filings, company websites, and LinkedIn profiles. Firms are ranked by assets under management in L.A. County offices as of December 31, 2023. To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors may

occur. Please send corrections or additions on company letterhead to the Research Department, Los Angeles Business Journal, 11150 Santa Monica Blvd., Suite 350, Los Angeles, CA 90025. ©2024 Los Angeles Business Journal. This list may not be reprinted in whole or in part without prior written permission from the editor. Reprints are available from Wright's Media at (877) 652-5295. NA - Not Available