

List Name: LEADING PROVIDERS – WEALTH MANAGERS OF SOUTHERN CALIFORNIA
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The following firms were among those interviewed by Goldline Research as part of the research process for the aforementioned list.

Apex Wealth Management

Bayside Financial Group

Finestone Partners

Heller Capital Resources

Luminous Capital, LLC

Mullen Advisory, Inc.

Redwitz Wealth Management

Robert Errico, CFP®

Summit Portfolio Management

The Summa Group

Windward Capital Management

Woodland, Leishman & Associates