

Sacramento Advisor ProsperPlan Wealth Voted Region's Best Financial Planner

Annual Sacramento Bee award competition enables area residents to vote for their favorite local businesses in over 275 categories.

GOLD RIVER (SACRAMENTO), CA, UNITED STATES, November 17, 2025 /EINPresswire.com/ -- Award-winning

independent financial planning firm,

ProsperPlan Wealth, which was co-founded by advisors Lauren Williams, CFP®, CRPC®, MBA, and [Chris Grellas](#), CFP®, MSFA, has earned the gold medal in The Sacramento Bee's 2025 "Sacramento Favorites" awards, capturing the title of the region's [Favorite Financial Planner](#). Winners were determined based on a month's long open voting process that relies on the opinions of area citizens and business owners.

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We founded ProsperPlan Wealth to create something better: a firm where clients feel known, supported, and confident in their financial decisions.”

Chris Grellas

“Of all the awards we've received, this is the most meaningful,” said ProsperPlan co-founder Lauren Williams. “Being voted as Sacramento's favorite financial planner means our clients have tremendous faith in us and that the ProsperPlan name truly resonates with the broader community we're honored to serve.”

“We founded ProsperPlan Wealth to create something

better: a firm where clients feel known, supported, and confident in their financial decisions,” said co-founder Chris Grellas. “Our role goes far beyond managing investments, though we take great pride in doing that exceptionally well. We see ourselves as active partners, helping clients grow and sustain their wealth through every season of life. We focus on tax planning, proactive strategy, and clear communication, but what truly sets us apart is our client experience. Clients tell us they feel calm here. They trust us and maintaining that confidence is at the heart of everything we do.”

The ProsperPlan Wealth partner advisory team is composed entirely of licensed fiduciaries who hold the CFP® designation and advanced degrees in finance, including a Master of Business Administration (MBA) with an emphasis in Financial Planning and a Master of Science in Financial



ProsperPlan
Wealth

ProsperPlan Wealth of Gold River, Roseville, California

Analysis (MSFA). United by a commitment to education and excellence, the team contributes to financial publications, mentors future advisors, and helps retirees, healthcare professionals, and families make confident, informed decisions about their wealth.

About ProsperPlan Wealth:

Founded by [Lauren M. Williams](#), CFP®, CRPC®, MBA and Chris Grellas, CFP®, MSFA, ProsperPlan Wealth is a fast-growing, fee-only financial planning firm with offices in Gold River and Roseville, California. The firm is known for helping retirees, families, and business owners simplify financial complexity and find confidence in every decision. With a focus on retirement planning, tax strategy, and life transitions, ProsperPlan helps clients turn years of hard work into lasting wealth and peace of mind, empowering them to retire confidently, maximize their income, and secure their financial future. (Advisory services offered through NewEdge Advisors, LLC, a registered investment adviser.)

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