

ProsperPlan Wealth Nominated for Sacramento Business Journal's Favorite Financial Planner and Wealth Manager for 2026

Nomination follows a first-place win for Favorite Financial Planner and a second-place finish for Favorite Wealth Manager in 2025 competition.

GOLD RIVER, (SACRAMENTO), CA, UNITED STATES, July 27, 2026 /EINPresswire.com/ -- Award-winning independent financial planning firm ProsperPlan Wealth, co-founded by advisors [Lauren Williams](#), CFP®, CRPC®, MBA, and [Chris Grellas](#), CFP®, MSFA, has once again been nominated in the Sacramento Business Journal's annual "Favorites" competition, this year in both the Favorite Financial Planner and Favorite Wealth Manager categories. The nomination builds on ProsperPlan's strong showing in the 2025 competition, where the firm placed first in Favorite Financial Planner and second in the Favorite Wealth Manager categories. Winners are determined by an open, region-wide voting process among Sacramento Business Journal readers and area business owners.



ProsperPlan Wealth Founders



ProsperPlan
Wealth

ProsperPlan Wealth of Gold River, Roseville, California

"Being nominated again means a great deal to us," said ProsperPlan co-founder Lauren Williams. "Last year's results told us that our approach is resonating, not just with our clients but with the broader Sacramento business community. We're honored to be back in the running, and we'd be grateful for the community's support again this year."



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Lauren M. Williams

"We built ProsperPlan Wealth to give clients a genuinely different experience: one where they feel known, supported, and confident in their financial decisions," said co-founder Chris Grellas. "Recognition like this reflects the trust our clients place in us every day. Whether we're helping someone plan for retirement, navigate a business transition, or build a legacy for their family, our focus stays the same: clear strategy, proactive communication, and a calm, steady partnership through every stage of life."

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 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.

Voting in the Sacramento Business Journal's 2026 Favorites competition is open to the public until August 7th; details are available on the publication's website.

About ProsperPlan Wealth:

Founded by Lauren M. Williams, CFP®, CRPC®, MBA and Chris Grellas, CFP®, MSFA, ProsperPlan Wealth is a fee-only, 100% fiduciary financial planning firm with offices in Gold River and Roseville, California. The firm is known for helping retirees, families, healthcare workers, and business owners create and implement holistic financial plans and feel confident about the future. 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.)

To learn more about ProsperPlan Wealth, visit www.prosperplan.com

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