

Apriem Advisors' Chris Whitaker Named to Forbes Best-In-State Next-Gen Advisors List

35-year-old Chief Wealth Manager recognized as a California advisor to watch, following a year of significant growth and team leadership honors.

IRVINE, CA, UNITED STATES, August 24, 2026 /EINPresswire.com/ -- [Apriem Advisors](#), an independent, fiduciary wealth management firm based in Irvine, California, announced today that [Chris Whitaker](#), CFP®, AIF®, Chief Wealth Manager and Partner, has been named to the [Forbes](#) Best-In-State Next-Gen Advisors list for California in 2026.

At 35, Whitaker has spent 11 years in the financial services industry and nine years at Apriem, rising to Chief Wealth Manager in 2025. Over the past year, assets under management for client relationships where he serves as the primary wealth advisor increased 42.86%, from June 30, 2025, to June 30, 2026, while maintaining a client retention rate of 99.4%*.



"I'm honored to be recognized on the Forbes Best-In-State Next-Gen Wealth Advisor list. The real credit belongs to the families who let us help them protect both their wealth and their relationships across generations!" says Whitaker.

As Chief Wealth Manager, Whitaker leads a team of 10 advisors at Apriem. Under his leadership, Apriem has earned recognition including the 2026 USA Today Best Financial Advisory Firms list (\$1B–\$5B category) and the 2025 CNBC Financial Advisor 100 list. Whitaker himself was named to the Irvine Chamber of Commerce's 40 Under 40 list in 2023 and is currently a finalist for the Orange County Business Journal's Excellence in Leadership Award, with winners to be announced in September 2026. He recently began the Yale School of Management Wealth

Management Theory & Practice program, an approved education program for the Certified Private Wealth Advisor® (CPWA®) certification.

About Apriem Advisors

Apriem Advisors is an independent, fiduciary wealth management firm based in Irvine, California, serving high-net-worth families through life's biggest financial transitions. The firm manages over \$1.5 billion in assets, has served clients for over 28 years, and maintains a client retention rate of over 99%**.

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Disclosures:

Advisory services are offered through Apriem Advisors, a registered investment adviser with the SEC. Registration does not imply a certain level of skill or training, and Apriem may only provide advice in jurisdictions where properly registered or exempt.

*As of 8/12/26

**As of 7/14/26

For a full list of awards and disclosures, visit: <https://www.apriem.com/disclosures/>

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