Apriem Advisors Earns Three National and Regional Recognitions to close out 2026

Apriem Advisors named Leading RIA (InvestmentNews), Best Fiduciary Wealth Management Firm (Wealth & Finance Intl.), and Best Advisors in Irvine (Expertise.com)



Apriem Advisors leadership team recognized for excellence in wealth management and industry impact

Your Family's Multigenerational Wealth Management Team

IRVINE, CA, UNITED STATES, September 29, 2026 /EINPresswire.com/ -- Apriem Advisors, an independent fiduciary wealth management firm based in Irvine, California, is closing out 2026 with its most recognized year to date. The firm was named a Leading RIA in Irvine, CA by InvestmentNews, earned Best Fiduciary Wealth Management Firm in California honors as part of Wealth & Finance International's Investment Excellence Awards 2026, and was recognized among the Best Financial Advisors in Irvine, CA by Expertise.com. The three honors follow Chief Wealth Manager Chris Whitaker's earlier 2026 recognition on Forbes' Best-In-State Next-Gen Wealth Advisors list amongst numerous others, rounding out a year in which Apriem was recognized by numerous international, national and regional publications.

"These recognitions reflect something our clients already know: that being independent and fiduciary isn't just a legal designation for us, it's how we actually operate every day. Whether it's coordinating a family's investments, tax planning, and estate strategy, or simply being available when something in a client's life changes, our team is built to do this work at a scale where we can actually know the people we serve. I'm proud of what this says about the team here at Apriem," said Chris Whitaker, CFP®, AIF®, Chief Wealth Manager at Apriem Advisors.

About Apriem Advisors
Apriem Advisors is an independent, fiduciary registered investment adviser based in Irvine, California. For more than 28 years, the firm has helped individuals and families coordinate investment management, financial planning, tax planning, and estate planning as one connected relationship. Apriem currently serves more than 1,000 households nationwide* and has a client retention rate above 99%**.

Disclosures:
*As of 7/14/26
**Client retention rate above 99% for the year-to-date period ending July 14, 2026.

Apriem Advisors was named to InvestmentNews' 2026 Leading RIA firms ranking for Irvine, California. InvestmentNews identified the leading RIA firms in each city using data reported on Form ADV. To qualify for inclusion, firms were required to meet all of the following criteria: 1. The most recent Form ADV filing date is on or after January 1, 2025; 2Total regulatory assets under management (AUM) of at least $200 million; 3. Reported managed assets for U.S. clients. For firms serving both U.S. and non-U.S. clients, total regulatory AUM as reported on Form ADV is used for ranking purposes; 4. Excluded are firms that primarily manage money for institutional clients (e.g., funds, pooled vehicles, or other advisors), have little or no direct business with individual or small-business investors, do not provide them with financial planning or portfolio management services, and are classified as serving institutional-only channels rather than retail clients; and 5. At least one direct owner or executive officer holds an ownership stake of 50% or more in the firm, as reported on Schedule A of Form ADV. Rankings are based on the firm's "Principal Office and Place of Business" city as reported on Form ADV, matched by exact city name. The Top List ranking is determined by total regulatory AUM. For firms that filed more than one annual update to Form ADV during the year, only the most recent filing for that year was used. Apriem Advisors did not pay a fee for consideration or inclusion in the ranking but may pay for inclusion in a special report and related marketing materials. This recognition is not indicative of future performance and may not be representative of any one client's experience.

The Best Fiduciary Wealth Management Firm 2026 – California recognition is awarded by Wealth & Finance International as part of its Investment Excellence Awards 2026. Entry is open to any organization and can occur through self-submission, third-party recommendation, or nomination by the publisher. Nominees are asked to formally accept or decline their nomination before any research begins; those who accept form a shortlist that advances to internal review. Winners are determined by Wealth & Finance's in-house research team based on the merit of the entry, evidence of recent accomplishments, and both qualitative and quantitative research, rather than by public vote count. Nominees may submit supporting evidence as part of this process. A senior judge reviews the research team's findings to make the final determination, based on demonstrated expertise, commitment to client fulfillment, notable performance, and commitment to innovation. Apriem Advisors did not pay a fee for consideration or inclusion in the ranking but may pay for inclusion in a special report and related marketing materials. This

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The Best Financial Advisors in Irvine, CA recognition is awarded by Expertise.com, which reviews and ranks top service professionals across more than 200 industries nationwide. Expertise.com's selection process evaluates providers across three areas: availability, using public databases and customer referrals to identify local businesses and confirm their service areas; qualifications, validating relevant licenses, certifications, and accreditations; and reputation, analyzing review data across multiple professional databases, including average review scores and the consistency of those ratings over time. Expertise.com researches more than 60,000 businesses each month as part of this process. Apriem Advisors did not pay a fee for consideration or inclusion in the ranking but may pay for inclusion in a special report and related marketing materials. This recognition is not indicative of future performance and may not be representative of any one client's experience.

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