About Us

Our Philosophy

Nobody escapes life's transitions.

Nobody escapes life's transitions. HCR prides itself on helping clients weather the uncertainty of financial markets by developing a sound strategy to help secure a brighter financial future.

Facing and overcoming challenges is our business. Our goal is to integrate your investments, retirement plans and financial targets into one comprehensive strategy that grows and matures right along with you.

- Marriage
- Divorce
- Loss of a Loved One
- Sudden and Significant Influx of Assets
- Selling a Business
- Starting a Business
- Inheritance
- Retirement

Our Client Relationship is Unique

Ask yourself this question:

In My Retirement, I Want to...

We help you make sure
that answer is achieveable.

Our mission at HCR is to establish life-long relationships with our clients through [illegible]tion, trust, communication and most of all, service. We're there to point out financial risk and exposure and ensure you are prepared for any unexpected curveballs.

We maintain the strictest security and confidentiality with our clients. Protecting your privacy underscores everything we do.

Many of our clients have been with HCR for over ten years. We work hand in hand with our clients to advise them of market fluctuations and new investment strategies.

We no longer live in a 'one size fits all' kind of world, each plan and strategy is personalized and unique to the client's needs at that time in their lives. HCR has employed this strategy for over 25 years. And it works.

Who We Are

(/)

Our team consists of independent advisors (and thinkers). We have the freedom to serve in the best interest of the client-at all times.

Every single member is fully engaged in the process of empowering our clients to accomplish their goals through education. We specialize in developing a plan that helps clients define and achieve financial freedom.

Greg Heller, CFP®
Founder & CEO (https://www.hcrwealth.com/team_page/greg-heller-cfp/)

Steve Weinberger, CFP®

ior Managing Director (https://www.hcrwealth.com/team_page/steve-weinberger-cfp/)

Jordan Kahn, CFA®

Chief Investment Officer (https://www.hcrwealth.com/team_page/jordan-kahn-cfa/)

Dave Hindler

Managing Director (https://www.hcrwealth.com/team_page/dave-hindler/)

Matthew Jensen

Managing Director (https://www.hcrwealth.com/team_page/matthew-jensen/)

(/)

Shawn Landis, CFP®
Senior Advisor (https://www.hcrwealth.com/team_page/shawn-landis-cfp/)

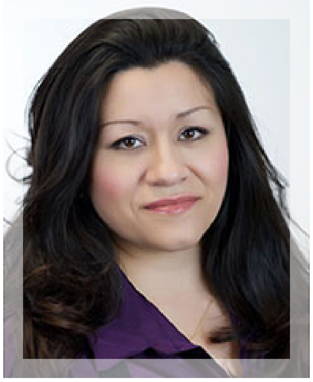
Michelle Katzen, CFP®
Senior Portfolio Manager (https://www.hcrwealth.com/team_page/michelle-meacham/)

Carl Aschenbrenner, CFA®
Portfolio Manager (https://www.hcrwealth.com/team_page/carl-aschenbrenner-cfa/)

Jordan Hanson, CFP®
Financial Advisor (https://www.hcrwealth.com/team_page/jordan-hanson-3/)

Mikki Murty
Director of Operations

Michelle Tu
Private Client Services



Elizabeth Villegas
Private Client Services

Debra Gottleib
Office Manager

Jane Whiteman
Private Client Services

What We Do

(https://www.hcrwealth.com/what-we-do/financial-services-wealth-management/)

Financial Services & Wealth Management

(https://www.hcrwealth.com/what-we-do/consulting/)

Consulting

(https://www.hcrwealth.com/what-we-do/business-services/)
Business Services

(https://www.hcrwealth.com/what-we-do/insurance-services/)
Insurance Services

Why Us?

- Transparency
- Empowerment
- Trust
- A Partnership
- Integrity
- Education

We work for YOU.

Independence is at the core of HCR's mission. When you work with a team member from HCR, the financial advice we offer is what is best for you.

We'll work with you to devise comprehensive wealth management solutions.

Our goal is to empower you and make sure you understand each and every decision that is made.

Why We're Different

In•de•pen•dent

adjective
Free from the influence, guidance or control of another or others; self-reliant.

We have the freedom to serve in the best interest of the client- at all times. You pay for strategy and advice.

Our job is to advise you, not to sell you. We show you ALL the options—the full range of possibilities, not just proprietary investment products that are associated with a particular brokerage house.

HCR does not accept commissions from mutual fund companies or money managers and does not employ the use of proprietary products.

HCR uses an advisory model that allows our guidance to be totally agnostic and free of any conflict of interest regarding products or investment strategy.

HCR does not take custody of any client assets. All of our client's accounts reside at SIPC insured institutions.

How We Work
The 7 Step Process

Many of our clients share similar concerns, that they will outlive their money.

Our job is to make sure you have enough money to sustain your lifestyle and achieve financial freedom. We'll look at all your assets and develop a plan that is understandable, workable and most of all, achievable.

You worked hard to earn your money and now it's time that money starts working for you.

Together We...

1 Lay it all out and determine exactly what you have. Establish goals and determine future objectives

2 Identify opportunities and build an "income and needs projection" to determine what you need now and in the future

3 Build a framework for the investment allocation which best suits you

4 Customize a private client online portal in order to provide 24/7 real-time access to assets, liabilities and net worth valuations

5 Review the investment strategy and track progress to ensure your goals are achieved

(/)

7

Closely monitor and analyze your portfolio's growth

Evaluate and adjust your plan as your life evolves

Fixed Income (/fixed-income/)

ty (/equity/)

Alternatives (/alternatives/)

Investment Strategy

Our investment process starts with a thorough understanding of our clients' specific needs and investment objectives.

We then implement our strategy using a wide array of investment vehicles, ranging from traditional investment managers to more sophisticated alternative investment managers, private equity, real estate, and individual securities.

We also utilize various risk management techniques and hedging strategies to carefully manage our client accounts.

Partners

Who We Work With

Collaborative Partners & Non-Profit Affiliations

HCR works closely with a number of successful non-profits. We believe that a sound financial framework involves giving back. We help our clients participate with existing organizations and/ or create their own philanthropic entities.

Contact Us

Contact Form

First & Last Name *

Email Address *

Phone Number

Message Subject *

Your Message *

Submit

10866 Wilshire Blvd Suite 1600
Los Angeles, CA 90024
Phone: (310) 473-5445
Fax: (310) 473-5775