

THE LIST

MONEY MANAGEMENT FIRMS

Ranked by assets managed in Los Angeles County as of Dec. 31

▶ NEXT WEEK
LA500

Rank		Firm • name • address • website	Assets Managed in L.A. County • 2019 • 2018 (in billions)	Portfolio Mix (by percent)					L.A. County Staff • portfolio managers • researchers	Profile • headquarters • client contact(s)	Chief Investment Officer • name • phone	
				• equity	• fixed income	• cash equivalent	• real estate	• other				
1		Capital Group 333 S. Hope St. Los Angeles 90071; thecapitalgroup.com	\$1,700.0 ¹ \$1,944.0 ²	NA	NA	NA	NA	NA	NA	Los Angeles NA	Timothy Armour (213) 486-9200	
2		Western Asset Management Co. 385 E. Colorado Blvd. Pasadena 91101; westernasset.com	270.4 232.8	0	100	0	0	0	28 17	Pasadena Derek Fan	S. Kenneth Leech (626) 844-9400	
3		TCW Group Inc. 865 S. Figueroa St., Suite 1800 Los Angeles 90071; tcw.com	217.5 190.7	6	92	0	0	3	23 82	Los Angeles Joseph Carieri Alex McCulloch	Michael Reilly Tad Rivelle (213) 244-0000	
4		Guggenheim Partners Investment Management 100 Wilshire Blvd. Santa Monica 90401; guggenheimpartners.com	200.3 ² 189.9 ²	NA	NA	NA	NA	NA	NA	New York/Chicago NA	Scott Minerd (310) 576-1270	
5		DoubleLine Capital 333 S. Grand Ave., 18th Floor Los Angeles 90071; doubleline.com	148.4 ² 120.0 ²	NA	NA	NA	NA	NA	NA	Los Angeles Ronald Redell	Jeffrey Gundlach (213) 633-8200	
6		Primecap Management Co. 177 E. Colorado Blvd., 11th Floor Pasadena 91105; primecapmanagement.com	147.4 ² 127.1	100	0	0	0	0	NA	Pasadena Douglas McCrary	Theo Kolokotronis Joel Fried Alfred Mordecai (626) 304-9222	
7		Payden & Rygel 333 S. Grand Ave., Suite 3900 Los Angeles 90071; payden.com	119.1 111.5	2	98	0	0	0	43 48	Los Angeles Brian Matthews James Sarni	Investment Policy Committee (213) 625-1900	
8		CBRE Global Investors 601 S. Figueroa St., Suite 4900 Los Angeles 90071; cbreglobalinvestors.com	112.9 105.5	0	0	0	100	0	NA	Los Angeles Michael McMenomy	Ian Gleeson (213) 683-4200	
9		Ares Management Corp. 2000 Avenue of the Stars, 12th Floor Los Angeles 90067; aresmgmt.com	102.4 ² 130.7	NA	NA	NA	NA	NA	NA	Los Angeles NA	NA (310) 201-4100	
10		Morgan Stanley 444 S. Flower St., 34th Floor Los Angeles 90071; morganstanley.com	92.8 ¹ 92.8 ¹	NA	NA	NA	NA	NA	NA	New York NA	NA (213) 486-8915	
11		UBS Financial Services Inc. 515 Flower St., Suite 5000 Los Angeles 90071; ub.com	89.8 83.8	NA	NA	NA	NA	NA	NA	Zurich & Basel, Switzerland Jaron Singletary Lauren Gorsche Ryan Hollander	Mike Ryan Solita Marcelli 310-772-7000	
12		Merrill Lynch 100 Wilshire Blvd. Santa Monica 90401; ml.com	75.2 70.4	NA	NA	NA	NA	NA	NA	Charlotte, N.C. Dominic Chow	Chris Hyzy (800) 937-0620	
13		Wilshire Associates Inc. 1299 Ocean Ave., Suite 700 Santa Monica 90401; wilshire.com	72.3 60.5	NA	NA	NA	NA	NA	NA	Santa Monica NA	Joshua Emanuel Steve Foresti (310) 451-3051	
14		Oaktree Capital Management 333 S. Grand Ave., 28th Floor Los Angeles 90071; oaktreecapital.com	72.1 77.0	8	17	0	11	64	17 109	Los Angeles Andrea Williams	Bruce Karsh (213) 830-6300	
15		Causeway Capital Management 11111 Santa Monica Blvd., 15th Floor Los Angeles 90025; causewaycap.com	53.2 51.4	100	0	0	0	0	NA	Los Angeles Eric Crabtree	Sarah Ketterer (310) 231-6100	
16		Colony Capital Inc. 515 S. Flower St., 44th Floor Los Angeles 90071; clny.com	49.0 42.7	1	0	0	58	41	20 0	Los Angeles Severin White	Jonathan Grunzweig (310) 282-8820	

¹ Business Journal estimate.² Financial information from Securities and Exchange Commission filings.

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Researched by Joshua Niv

Continued on page 14

MONEY MANAGEMENT FIRMS

Continued from page 13

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				• equity	• fixed income	• cash equivalent	• real estate	• other				
17		U.S. Bank 633 W. 5th St. Los Angeles 90071; usbank.com	\$47.6 \$41.5	NA	NA	NA	NA	NA	NA	Minneapolis John Sinnema	Eric Freedman (213) 615-6566	
18		City National Bank 555 S. Flower St. Los Angeles 90071; cnb.com	47.5 38.2	44	40	13	0	3	NA	Los Angeles Tom Galvin	Tom Galvin (310) 888-6300	
19		Hotchkis & Wiley Capital Management 601 S. Figueroa St., 39th Floor Los Angeles 90071; hwcm.com	33.6 27.2	87	11	2	0	0	NA	Los Angeles Tom Hirschmann	George Davis (213) 430-1000	
20		Kayne Anderson Rudnick Investment Management 1800 Avenue of the Stars, Second Floor Los Angeles 90067; kayne.com	33.0 22.8	96	4	0	0	0	12 5	Los Angeles Stephen Rigali	Douglas Foreman (800) 231-7414	
21		Wells Fargo & Co. 707 Wilshire Blvd. Los Angeles 90017; wells Fargo.com	32.0 ¹ 32.0 ¹	NA	NA	NA	NA	NA	NA	San Francisco Lance Fox	Adam Taback (800) 869-3557	
22		Aristotle Capital Management 11100 Santa Monica Blvd., Suite 1700 Los Angeles 90025; aristotlecap.com	31.3 15.5	100	0	0	0	0	5 9	Los Angeles Ranjit Sufi Patrick Schussman	Catalina Linás (310) 478-4005	
23		Kayne Anderson Capital Advisors 1800 Avenue of the Stars, Third Floor Los Angeles 90067; kaynecapital.com	29.8 ² 25.1	NA	NA	NA	NA	NA	NA	Los Angeles Eileen Mancera	Bob Sinnott (800) 638-1496	
24		FPA 11601 Wilshire Blvd., Suite 1200 Los Angeles 90025; fpa.com	29.0 26.4	NA	NA	NA	NA	NA	NA	Los Angeles Mark Hancock	NA (310) 996-5485	
25		Crescent Capital Group 11100 Santa Monica Blvd., Suite 2000 Los Angeles 90025; crescentcap.com	28.5 26.0	0	100	0	0	0	NA	Los Angeles Joseph Viola	Investment Committee (310) 235-5900	
26		Los Angeles Capital Management and Equity Research 11150 Santa Monica Blvd., Suite 200 Los Angeles 90025; lacapm.com	27.2 ² 25.5	100	0	0	0	0	NA	Los Angeles Daniel Allen Thomas Stevens	Hal Reynolds (310) 479-9998	
27		Canyon Partners ¹ 2000 Avenue of the Stars, 11th Floor Los Angeles 90067; canyonpartners.com	26.3 23.5 ²	NA	NA	NA	NA	NA	NA	Los Angeles Ingrid Kiefer	Todd Lemkin (310) 272-1000	
28		Post Advisory Group 2049 Century Park East, Suite 3050 Los Angeles 90067; postadvisory.com	17.9 15.8	0	100	0	0	0	6 10	Los Angeles Hugh Costello	Jeffrey Stroll (310) 996-9600	
29		First Republic Private Wealth Management 1888 Century Park East Los Angeles 90067; firstrepublic.com	17.7 24.0	52	29	8	0	11	25 13	San Francisco George Buza	Christopher Wolfe (310) 712-1888	
30		First Quadrant 800 E. Colorado Blvd., Suite 900 Pasadena 91101; firstquadrant.com	16.2 ² 20.1 ²	NA	NA	NA	NA	NA	NA	Pasadena Brian Rowe	Jeppe Ladekarl Jia Ye (626) 795-8220	
31		Capital Group Private Client Services 333 S. Hope St. Los Angeles 90071; capitalgroup.com/pcs	13.5 11.5	NA	NA	NA	NA	NA	NA	Los Angeles NA	William Robbins (866) 421-2166	
32		Beach Point Capital Management 1620 26th St., Suite 6000N Santa Monica 90404; beachpointcapital.com	12.9 11.6	8	70	8	0	14	8 20	Santa Monica John Quintanar	Carl Goldsmith Scott Klein (310) 996-9700	

¹ Business Journal estimate.² Financial information from Securities and Exchange Commission filings.³ Includes Canyon Capital Advisors, Canyon Capital Realty Advisors and ICE Canyon.

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33		Aspiriant 11100 Santa Monica Blvd., Suite 600 Los Angeles 90025; aspiriant.com	\$12.8 ¹ \$11.7	NA	NA	NA	NA	NA	NA	Los Angeles Tom Tracy	John Allen (415) 371-7800	
34		American Realty Advisors 515 S. Flower St., 49th Floor Los Angeles 90071; aracapital.com	10.3 9.8	0	0	0	100	0	7 2	Los Angeles Jay Butterfield	Stanley Iezman (213) 233-5700	
35		NWQ Investment Management Co. 2049 Century Park East, 16th Floor Los Angeles 90067; nwq.com	10.1 ¹ 9.8	65	6	0	0	29	NA	Los Angeles NA	Jon Bosse (310) 712-4000	
36		Bel Air Investment Advisors 1999 Avenue of the Stars, Suite 3200 Los Angeles 90067; belair-llc.com	9.1 ¹ 7.9 ¹	NA	NA	NA	NA	NA	NA	Los Angeles Todd Morgan	David Sadkin (310) 229-1500	
37		Mesa West Capital 11755 Wilshire Blvd., Suite 2100 Los Angeles 90025; mesawestcapital.com	8.3 7.3 ¹	0	0	0	100	0	5	Los Angeles Ryan Krauch	Jeff Friedman Mark Zytco (310) 806-6300	
38		Northern Trust 2049 Century Park East, Suite 3600 Los Angeles 90067; northerntrust.com	8.0 8.1	47	44	2	3	4	NA	Chicago Jason Lawit	Richard Barnett (310) 282-3800	
		Everett Harris & Co. 888 W. 6th St., 10th Floor Los Angeles 90017; everettharris.com	8.0 ¹ 6.9 ¹	NA	NA	NA	NA	NA	NA	Los Angeles David Clark	Jim Ward (213) 625-2677	

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Continued on page 16

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Continued from page 15

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40		BNY Mellon Wealth Management 10250 Constellation Blvd., Suite 2100 Los Angeles 90067; bnymellonwealth.com	\$7.7 \$6.8	NA	NA	NA	NA	NA	NA	New York Steve Kutz	Leo Grohowski (424) 277-6829	
41		Camden Asset Management 2029 Century Park East, Suite 2010 Los Angeles 90067; camdenasset.com	7.4 7.6 ¹	NA	NA	NA	NA	NA	NA	Los Angeles Stan Debreu	John Wagner (310) 203-4200	
42		Pacific Income Advisers 1299 Ocean Ave., Second Floor Santa Monica 90401; pacificincome.com	7.1¹ 7.1 ¹	0	100	0	0	0	NA	Santa Monica Tim Tarpening	Lloyd McAdams (310) 393-1424	
43		Whittier Trust Co. 1600 Huntington Drive South Pasadena 91030; whittiertrust.com	6.7 5.4	70	11	6	12	1	11	South Pasadena Tim McCarthy	Sandip Bhagat (626) 441-5111	
44		Churchill Management Group 5900 Wilshire Blvd., Suite 400 Los Angeles 90036; churchillmanagement.com	6.6 5.5	83	5	12	0	0	6 2	Los Angeles Ted Fern	Randy Conner (877) 937-7110	
45		Angeles Investment Advisors 429 Santa Monica Blvd., Suite 650 Santa Monica 90401; angelesadvisors.com	5.8¹ 4.3	55	21	0	3	21	NA	Santa Monica NA	Michael Rosen (310) 857-5630	
46		Fiduciary Trust International 444 S. Flower St., Suite 3200 Los Angeles 90071; fiduciarytrust.com	5.6² 5.6 ²	NA	NA	NA	NA	NA	NA	New York Stephen Dutka	Ronald Sanchez (800) 421-9683	
47		Lido Advisors 1875 Century Park East, Suite 950 Los Angeles 90067; lidoadvisors.com	5.4¹ 4.0	35	30	5	15	15	NA	Los Angeles Gregory Kushner	Jeff Garden (310) 278-8232	
48		Empyrean Capital Partners 10250 Constellation Blvd., Suite 2950 Los Angeles 90067; empyrean.com	5.3¹ 5.8 ¹	NA	NA	NA	NA	NA	NA	Los Angeles Kate Baumann	Amos Meron (310) 843-3000	
49		Main Street Advisors 3110 Main St., Suite 310 Santa Monica 90405; NA	5.2¹ 4.8 ¹	NA	NA	NA	NA	NA	NA	Santa Monica NA	Paul Wachter (310) 392-7607	
		Signature Estate & Investment Advisors 2121 Avenue of the Stars, Suite 1600 Los Angeles 90067; seia.com	5.2 6.1	60	30	6	0	4	2 1	Los Angeles NA	Deron McCoy (310) 712-2323	
51		ICG Advisors 11111 Santa Monica Blvd., Suite 2100 Los Angeles 90025; icgadvisors.com	5.0¹ 4.5	NA	NA	NA	NA	NA	NA	Los Angeles Jonathan Blenner Robert Edelstein	J. Jeffrey Assaf (424) 270-8900	
52		RNC Genter Capital Management 11601 Wilshire Blvd., 25th Floor Los Angeles 90025; rncgenter.com	4.9 3.6 ¹	50	50	0	0	0	9 16	Los Angeles Cameron Lavey Brian Elliott	Daniel Genter (800) 877-7624	
		Capital Research & Consulting 15 S. Raymond Ave., Suite 200 Pasadena 91105; capitalresearchandconsulting.com	4.9¹ 3.9 ¹	NA	NA	NA	NA	NA	NA	Pasadena Michael Haney	John Odell (626) 844-1440	
54		Santa Barbara Asset Management 2049 Century Park East, 17th Floor Los Angeles 90067; sbasset.com	4.7¹ 11.7	95	0	5	0	0	NA	Los Angeles Chris Perry	David Park (310) 552-5100	
55		Sierra Investment Management Inc. 3420 Ocean Park Blvd., Suite 3060 Santa Monica 90405; sierrainvestment.com	4.6 3.3	25	60	0	0	15	3 0	Santa Monica Joy Bunzel	Terri Spath (310) 452-1887	

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56		Glendon Capital Management 1620 26th St., Suite 2000N Santa Monica 90404; N/A	\$4.5 ¹ \$1.9 ¹	NA	NA	NA	NA	NA	NA	Santa Monica NA	Matthew Barrett (310) 907-0450	
		Flaherty & Crumrine Inc. 301 E. Colorado Blvd., Suite 800 Pasadena 91101; flaherty-crumrine.com	4.5 4.0	0	100	0	0	0	NA	Pasadena Chad Conwell	Committee (626) 795-7300	
58		Mar Vista Investment Partners 11150 Santa Monica Blvd., Suite 320 Los Angeles 90025; marvistainvestments.com	4.3 3.1 ¹	97	0	3	0	0	4 4	Los Angeles Jon Foust	Silas Myers (310) 917-2800	
		D.A. Davidson & Co. 624 S. Grand Ave., 26th Floor Los Angeles 90017; dadavidson.com	4.3 3.9	65	20	10	0	5	70 0	Great Falls, Mont. NA	NA (213) 620-1850	
60		Camden Capital 2301 Rosecrans Ave., Suite 2110 El Segundo 90245; camdencapital.com	3.8 4.0	28	56	1	1	14	4 5	El Segundo Rich Bursek	John Krambeer (310) 725-0210	
61		Westmount Asset Management 2049 Century Park East, Suite 2500 Los Angeles 90067; westmount.com	3.5 3.0	50	30	0	0	20	15 3	Los Angeles Mike Amash	Jim Berlimer (310) 556-2502	
		AdvicePeriod 2121 Avenue of the Stars, Suite 2350 Los Angeles 90067; adviceperiod.com	3.5 ¹ 3.0 ¹	NA	NA	NA	NA	NA	NA	Los Angeles NA	Larry Miles (424) 281-3600	

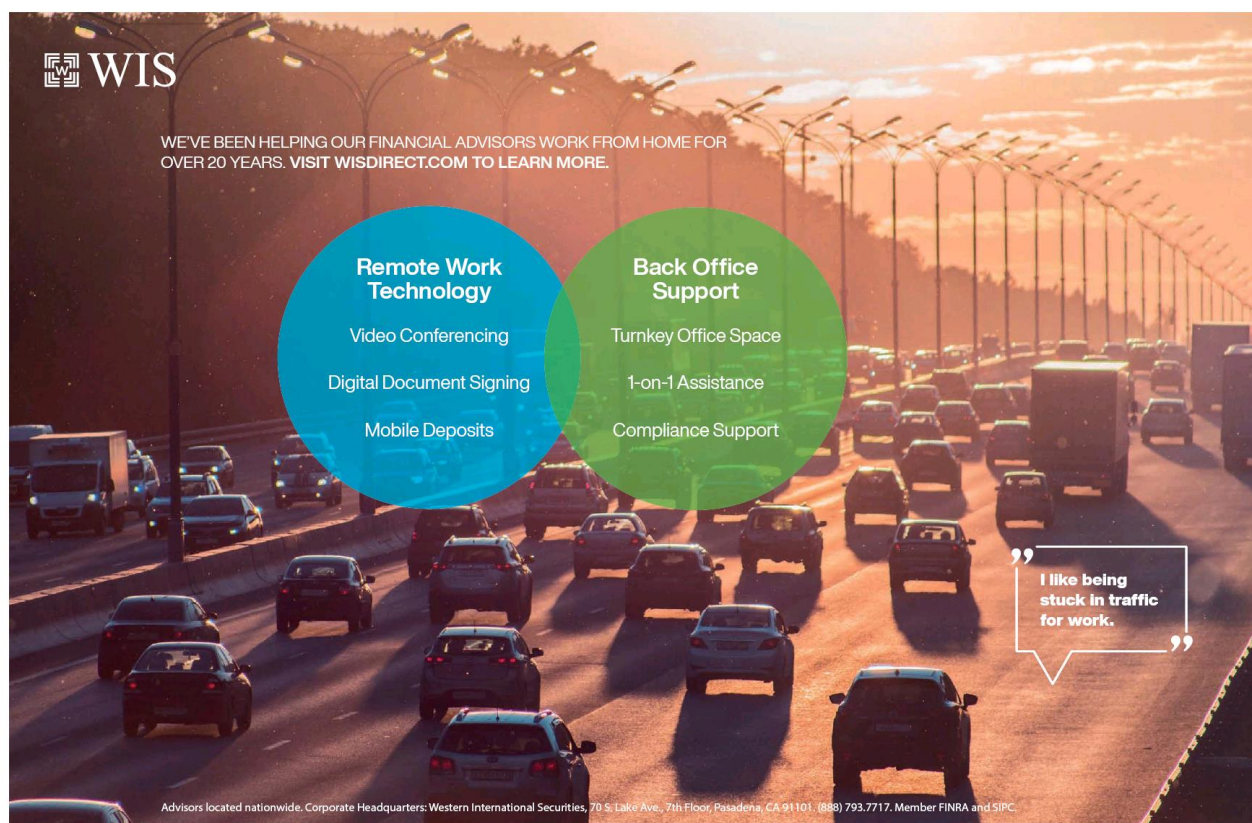
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Continued on page 18



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63	COAST Asset Management	Coast Asset Management 11150 Santa Monica Blvd., Suite 1400 Los Angeles 90025; coastasset.com	\$3.4 \$6.9	50%	50%	0%	0%	0%	NA	Los Angeles Andrew Tran	Dave Smith (310) 576-3500	
	Dalton Investments	Dalton Investments 1601 Cloverfield Blvd., Suite 5050 N Santa Monica 90404; daltoninvestments.com	3.4 3.5	100	0	0	0	0	2 13	Santa Monica Adam Woodward	James Rosenwald III (424) 231-9100	
65	CLIFFORD SWAN Investment Counselors	Clifford Swan Investment Counselors 177 E. Colorado St., Suite 550 Pasadena 91105; cliffordswan.com	3.3 2.8	70	19	8	2	1	11 8	Pasadena Linda Davis Taylor	Peter Boyle (626) 792-2228	
66	COVINGTON Capital Management	Covington Capital Management 601 S. Figueroa St., Suite 2000 Los Angeles 90017; covingtoncapitalmanagement.com	3.1 2.6	55	40	5	0	0	10 1	Los Angeles Jeffrey Glassman	Gary Arakawa (213) 629-7500	
	EP Wealth Advisors	EP Wealth Advisors 21515 Hawthorne Blvd., Suite 1200 Torrance 90503; epwealth.com	3.1 2.2	55	36	3	0	6	14 9	Torrance NA	Kevin Ashworth (310) 543-4559	
	Tortoise	Tortoise 555 W. 5th St., Suite 3700 Los Angeles 90013; tortoiseadvisors.com	3.1 ¹ 3.3 ¹	NA	NA	NA	NA	NA	NA	Leewood, Kan. Jennifer Park	Brad Beman (213) 687-9170	
69	ABACUS	Abacus Wealth Partners 429 Santa Monica Blvd., Suite 500 Santa Monica 90401; abacuswealth.com	2.7 ¹ 2.2 ¹	NA	NA	NA	NA	NA	NA	Santa Monica Brent Kessel	Darius Gagne (888) 422-2287	
	WIS	Western International Securities Inc. 70 S. Lake Ave, Seventh Floor Pasadena 91101; wisdirect.com	2.7 1.8	70	10	10	0	10	NA	Pasadena NA	Donald Bizub (888) 793-7717	
71	FOCUS INVESTORS	Focused Investors 9777 Wilshire Blvd., Suite 910 Beverly Hills 90212; focusedinvestors.com	2.6 ¹ 2.2 ¹	NA	NA	NA	NA	NA	NA	Beverly Hills Michael Kromm	Bruce Veaco (310) 734-1200	
72	HALBERT HARGROVE	Halbert Hargrove 111 Ocean Blvd., 23rd Floor Long Beach 90802; halberthargrove.com	2.5 ¹ 2.3 ¹	NA	NA	NA	NA	NA	NA	Long Beach Kelli Kiemle	Russ Hill (562) 435-5657	
73	CITIZENS BUSINESS BANK	CitizensTrust Wealth Management and Investment Services 1010 E. Colorado Blvd. Pasadena 91106; cbbank.com/investing	2.4 ¹ 2.4	41	47	9	3	0	NA	Ontario Don Evenson	Don Evenson (626) 720-1769	
74	GRANITE INVESTMENT PARTNERS	Granite Investment Partners 2321 Rosecrans Ave., Suite 4200 El Segundo 90245; granitepartners-llc.com	2.3 1.6	100	0	0	0	0	8 4	El Segundo Brad Stocum	NA (310) 933-3195	
75	CLIFFWATER	Cliffwater 4640 Admiralty Way, 11th Floor Marina del Rey 90292; cliffwater.com	2.2 ¹ 1.7 ¹	NA	NA	NA	NA	NA	NA	Marina del Rey NA	Stephen Nesbitt (310) 448-5000	
76	SSI INVESTMENT MANAGEMENT	SSI Investment Management 9440 Santa Monica Blvd., Eighth Floor Beverly Hills 90210; ssi-invest.com	2.1 1.8	53	37	0	0	10	NA	Beverly Hills James Kowal Walid Shinnawi	George Douglas (310) 595-2000	
77	MORTON CAPITAL	Morton Capital Management 27200 Agoura Road, Suite 200 Calabasas 91301; mortoncapital.com	2.0 1.8	24	14	5	9	48	11 3	Calabasas Eric Selter	Sasan Faiz (818) 222-4727	
78	AMI ASSET MANAGEMENT	AMI Asset Management Corp. 10866 Wilshire Blvd., Suite 770 Los Angeles 90024; amiassetmanagement.com	1.7 1.6	79	19	2	0	0	3 5	Los Angeles Matt Humiston	Chris Sessing (424) 320-4000	

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79		Gamble Jones Investment Counsel 301 E. Colorado Blvd., Suite 802 Pasadena 91101; gamblejones.com	\$1.6 \$1.3	60%	35%	5%	0%	0%	8 6	Pasadena TJ Jones	NA (626) 795-7583	
		Advanced Research Investment Solutions 10635 Santa Monica Blvd., Suite 240 Los Angeles 90025; arisconsulting.com	1.6 10.8	30	30	1	4	35	2 4	Los Angeles Damien Bissierier Alex Shahidi	Alex Shahidi (424) 283-3800	
81		Broadshore Capital Partners 11755 Wilshire Blvd., Suite 1350 Los Angeles 90025; broadshorecapital.com	1.5 ¹ 1.8	0	0	0	100	0	NA	Los Angeles Brad Howe Bleeker Seaman	NA (310) 571-4282	
		Poplar Forest Capital 70 S. Lake Ave., Suite 930 Pasadena 91101; poplarforestllc.com	1.5 1.7	97	0	3	0	0	4 8	Pasadena Brian Haskin	J. Dale Harvey (626) 304-6000	
		Howard Capital Management 11601 Wilshire Blvd., Suite 2080 Los Angeles 90025; howardcapital.com	1.5 1.3	55	45	0	0	0	NA	Los Angeles Jason Kaplan	David Robinson (310) 473-9100	
84		Rothschild & Co. Credit Management (North America) 633 W. 5th St., Suite 6700 Los Angeles 90071; rothschildandco.com	1.4 1.2	0	100	0	0	0	3 8	Los Angeles Michael Hatley	Michael Hatley (213) 621-3700	
85		Lindbrook Capital 10877 Wilshire Blvd., Suite 2000 Los Angeles 90024; lindbrookcapital.com	1.3 1.2	25	35	0	0	40	NA	Los Angeles Tyler Dritz	Ben Posen (424) 208-8000	

¹ Financial information from Securities and Exchange Commission filings.

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Continued on page 20

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MONEY MANAGEMENT FIRMS

Continued from page 19

Rank	Firm • name • address • website	Assets Managed in L.A. County • 2019 • 2018 (in billions)	Portfolio Mix (by percent)					L.A. County Staff • portfolio managers • researchers	Profile • headquarters • client contact(s)	Chief Investment Officer • name • phone	
			• equity	• fixed income	• cash equivalent	• real estate	• other				
	 Latitude Management Real Estate Investors Inc. 350 S. Beverly Drive, Suite 300 Beverly Hills 90212; lmrei.com	\$1.3¹ \$1.5 ¹	NA	NA	NA	NA	NA	NA	Beverly Hills NA	Glenn Sonnenberg (310) 234-2100	
87	 Miracle Mile Advisors 11300 W. Olympic Blvd., Suite 800 Los Angeles 90064; miraclemileadvisors.com	1.2 1.1	60	35	5	0	0	7 4	Los Angeles Brock Moseley	Brock Moseley (310) 246-1243	
88	 Joel R. Mogy Investment Counsel Inc. 315 S. Beverly Drive, Suite 400 Beverly Hills 90212; mogy.com	1.1¹ 1.0 ¹	NA	NA	NA	NA	NA	NA	Beverly Hills NA	Joel Mogy (310) 552-0529	
	 North Pier Fiduciary Management 4333 Admiralty Way, Suite G1-West Marina del Rey 90292; npier.com	1.1 1.1	64	24	9	1	2	NA	Los Angeles Jim Scheinberg Mae Diapera	James Scheinberg (800) 403-7065	
	 HCR Wealth Advisors 10866 Wilshire Blvd., Suite 1600 Los Angeles 90024; hcrwealth.com	1.1 0.9	40	40	2	2	16	8 2	Los Angeles Greg Heller	Jordan Kahn (310) 473-5445	
	 Patterson Capital Corp. 11100 Santa Monica Blvd., Suite 1950 Los Angeles 90025; pattersoncapital.com	1.1¹ 1.3 ¹	NA	NA	NA	NA	NA	NA	Los Angeles NA	Joseph Patterson (310) 556-2496	
92	 First Western Capital Management 1900 Avenue of the Stars, Suite 900 Los Angeles 90067; fwcapgmt.com	1.0¹ 0.8 ¹	NA	NA	NA	NA	NA	NA	Los Angeles NA	Barry Julien (310) 229-2940	
93	 Cove Street Capital 2101 E. El Segundo Blvd., Suite 302 El Segundo 90245; covestreetcapital.com	0.9¹ 0.9	100	0	0	0	0	NA	El Segundo Paul Hinkle	Jeffrey Bronchick (424) 221-5897	
94	 CS Capital Management Inc. 2274 E. Maple Ave. El Segundo 90245; cscapitalinc.com	0.8 1.0	0	0	0	100	0	NA	El Segundo Michael McHargue	Michael McHargue (310) 988-7300	
	 Huber Capital Management 2321 Rosecrans Ave., Suite 3245 El Segundo 90245; hubercap.com	0.8 1.2	96	0	4	0	0	NA	El Segundo Cindy Emanuel	Joseph Huber (310) 207-8400	
	 Wescap Group 330 N. Brand Blvd., Suite 1150 Glendale 91203; wescapgroup.com	0.8¹ 0.7 ¹	NA	NA	NA	NA	NA	NA	Glendale Rick Weinlein	Joel Edstrom (818) 563-5170	
	 Avitas Wealth Management 1901 Avenue of the Stars Los Angeles 90067; avitaswealth.com	0.8 0.6	49	48	3	NA	NA	3 5	Los Angeles NA	Russell Evans (424) 371-9010	
98	 Gould Asset Management 341 W. First St., Suite 200 Claremont 91711; gouldasset.com	0.6¹ 0.5 ¹	NA	NA	NA	NA	NA	NA	Claremont Jennella Johnson Beatriz Garcia	Donald Gould (909) 445-1291	
99	 Chelsea Management Co. 444 S. Flower St., Suite 2340 Los Angeles 90071; chelseamanagement.com	0.5¹ 0.4 ¹	68	21	11	0	0	NA	Los Angeles Sally Gallagher	Frederick Ruopp (213) 362-9200	
100	 Bridge Advisory 123 S. Marengo Ave., Suite 200 Pasadena 91101; bridgeadvisory.com	0.4¹ 0.4 ¹	NA	NA	NA	NA	NA	NA	Pasadena David Penniall	Justin Dyer (626) 795-3062	

¹ Financial information from Securities and Exchange Commission filings.

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