

Apriem Advisors, Irvine

Harmon Kong, Chief Wealth Manager/Founding Principal

Harmon Kong co-founded Apriem Advisors (previously Iwamoto Kong Wealth Management Group) with Mark Iwamoto, MBA, in 1998 with a vision of creating a family environment where wealth managers work with clients to pursue their own unique version of wealth, happiness and purpose. Under Kong's leadership, the Irvine-based independent, registered investment advisory firm has more than \$500 million in assets under management and works with more than 350 families across Southern California. The firm has seen a 20% year-over-year gain in assets under management, achieved without M&A activity. True to its Latin-based namesake, Apriem (meaning: to the highest degree), the firm strives to provide clients with the highest degree of service while handling all facets of their finances, helping them reach financial security and freedom. Apriem also specializes in the emerging class of female investors, offering Women of Wisdom (WOW) educational events for Orange County's high-net-worth population. Another important segment for Apriem's growth is the oil and gas sector, known as its Refinery Retiree Practice. Apriem is also part of the Charles Schwab Advisor Network (SAN).

