

ORANGE COUNTY BUSINESS JOURNAL

THE COMMUNITY OF BUSINESS™

B-36 ORANGE COUNTY BUSINESS JOURNAL

EXCELLENCE IN ENTREPRENEURSHIP AWARDS

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2018 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Apriem Advisors, Irvine

Harmon Kong, Founding Principal/Chief Wealth Manager

Harmon Kong and his partner, Mark Iwamoto, co-founded Apriem Advisors (formerly Iwamoto Kong Wealth Management Group) in 1998. They were inspired by their vision of a community where wealth managers could provide tailored services and work together with their clients to pursue their own unique version of wealth, happiness and purpose. 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. Together with his leadership team, Kong has shepherded the independent, registered investment advisory firm to 20% organic annualized growth in assets under management,



reaching \$600 million AUM in 2017. In addition to its family-focused work, Apriem provides specialized services to female clients through its Women of Wisdom (WOW) program, as well as retirees from the industrial sector. Apriem's Industrial Retiree Practice has recently expanded to include high-profile companies such as Parker Hannifin and Boeing. Apriem is also a part of the prestigious Charles Schwab Advisor Network (SAN).