



Apriem Advisors

Estate Planning

Investment Management

Financial Planning

Retirement Planning

Apriem Advisors is a wealth management company that is located in Irvine and serves diverse, multi-generational clients. The firm helps entrepreneurs, families, and investors through proactive planning, life transition guide, and generational wealth planning services. It also assists non-profit organizations and retirement plans in fiduciary matters, investment management, consultant meetings, and staff and office operations. Apriem Advisors supports global and local charities such as World Vision, Jessie Rees Foundation, and Southern California Hospice Foundation.

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Reputation: **A**

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Professionalism: **A+**

[More Info](#)

Price: **Free for first consultation**

Our Selection Process

Expertise.com finds and reviews the top service professionals in over **200** industries across the U.S. Each month, we research more than **60,000** businesses to help customers find the best-qualified professional for their needs. Our research process is always evolving to keep up with industry changes, so we're confident that when we say a provider is one of the best, it is.

AVAILABILITY

Finding Potential Picks

First, we identify all the potential providers in a community. We use public databases and [customer referrals](#) to collect an exhaustive list of local businesses, checking their availability and service areas.

QUALIFICATIONS

Look for Accreditations, Awards, and Licenses

Next, we validate each business' qualifications. We know which professions require a license or certification to operate in your area, and we find providers who have gone above and beyond to educate themselves in their area of expertise.

REPUTATION

Analyze Review Data

We scour public records and information to determine each provider's reputation. Every provider is analyzed based on the number of professional databases reviewing them, their average review score, and the volatility of their ratings.

EXPERIENCE

Assess Service Capabilities

After our screening processes, we select our finalists based on a provider's primary area of expertise, the variety of services they offer, and their years of experience.

PROFESSIONALISM

Mystery Shopping

Finally, our mystery shoppers call each company, identifying themselves as potential customers, to gauge knowledgeability, friendliness, and professionalism.