



# BEST PLACES TO WORK

## FOR FINANCIAL ADVISERS

The 75 firms presented here go beyond offering financial advisers attractive benefits and perks, they create workplaces that empower employees with the skills and confidence necessary to deliver the best possible investment and financial planning guidance to clients. In 2022, they're also taking steps to keep employees safe during the ongoing pandemic.

This is InvestmentNews' fifth annual list of Best Places to Work for Financial Advisers. Our 2022 winners represent firms with as few as 15 employees to hundreds. These impressive employers are located across the nation.

## 15-29 EMPLOYEES

**1 APRIEM ADVISORS**

**Employees** 16 | **Firm Type** RIA | **President** Rhonda Ducote | **Location** Irvine, California | **Primary Custodian** Schwab Advisor Services |



At Apriem Advisors, “Not one person is more important than another,” said Rhonda Ducote, president and CEO of the Irvine, California-based firm. “It takes all four departments — operations, planning, wealth management, investment management — and all the people within them to make the best experience for the client.”

Management took two important steps five years ago to intentionally foster this feeling of equality:

1. **Changing the compensation structure.** Previously, salespeople received percentages of the revenue they generated. “That had set up an ‘us versus them’ scenario because everyone else in the firm was doing just as much work,” Ducote said. Under the new system, everyone receives a salary and the same bonus structure. The change motivated employees to work together and growth took off, she said.
2. **Establishing an employee engagement committee that solicited employee suggestions.** One significant employee request was to make permanent the Covid-related hybrid schedule (three days in the office, two days virtual). The firm agreed, and not only did productivity and morale soar, but the virtual aspect enabled growth across the country.

InvestmentNews  
**BEST PLACES  
TO WORK 2022**  
FOR FINANCIAL ADVISERS

**MEDIA CONTACT:** Rhonda Ducote  
EMAIL ADDRESS: Rhonda@apriem.com  
PHONE NUMBER: (949) 253-8888

Apriem Advisors Named a **2022 Best Places to Work for Financial Advisers** by *InvestmentNews*.

Irvine, CA —February 7, 2022— Apriem Advisors has been recognized as a 2022 Best Places to Work for Financial Advisers as announced by *InvestmentNews* today.

Apriem Advisors was chosen as one of this year's top 75 based on employer and employee surveys delving into everything from company culture, benefits, career paths and more.

*“Not one person is more important than another,” said Rhonda Ducote, president and CEO of the Irvine, California-based firm. “It takes all four departments — operations, planning, wealth management, investment management — and all the people within them to make the best experience for the client.”*

*InvestmentNews* partnered with Best Companies Group, an independent research firm specializing in identifying great places to work, to compile the survey and recognition program.

“In a year that’s seen so much turmoil in the workplace – from mask mandates and canceled office re-openings to The Great Resignation – *InvestmentNews* is proud to spotlight those firms with a proven record of investing in their most valuable resource: their employees,” said Paul Curcio, executive editor of *InvestmentNews*. “We applaud this year’s finalists and wish them all the best in 2022.”

To learn more about the *InvestmentNews* 2022 75 Best Places to Work for Financial Advisers, please go to [Bestplacesforadvisers.com](https://bestplacesforadvisers.com).

[Click Here to Read More About Apriem Advisors](#)



---

**About *InvestmentNews***

*InvestmentNews* is the leading source for news, analysis and information essential to the financial advisory community. Since 1998, our standard of editorial excellence and deep industry knowledge has allowed us to educate, inform and engage the most influential financial advisers. Through a weekly newspaper, website, newsletters, research, events, videos and webcasts, *InvestmentNews* provides exclusive and up-to-the-minute news, as well as actionable intelligence, that empowers financial advisers to serve their clients and run their businesses more effectively whenever, however and wherever they need it.

The *InvestmentNews* headquarters are located in New York, with offices in Washington D.C. *InvestmentNews* is part of Bonhill Group.