



Angeles Wealth Management Appoints Rick Nott as Managing Director, Capping the Sixth Straight Year of Strong Growth

Nott brings more than 15 years of wealth management experience, adding to the firm's comprehensive private wealth services and solutions

Santa Monica, CA, February 6th, 2024 — [Angeles Wealth Management, LLC](#), ("Angeles Wealth"), a national wealth management firm serving generationally wealthy families, today announced the hiring of [Rick Nott, CFA, CFP®, CPWA®](#), as Managing Director. Operating out of Angeles Wealth's Santa Monica office, Nott serves as a "financial architect" for clients. He specializes in building bespoke plans and investment portfolios that aim to balance long-term capital accumulation with the building of an enduring legacy spanning multiple generations.

Nott brings more than 15 years of experience in wealth management with a specific focus on asset allocation and financial planning. At Angeles Wealth, Nott will utilize the firm's institutional-caliber investment process to create highly tailored and customized wealth management plans for ultra-high-net-worth (UHNW) families and individuals, including athletes, business owners and entrepreneurs. Prior to joining the firm, he was a senior wealth advisor at LourdMurray, and also spent time as an advisor at AdvicePeriod and Signature Estate and Investment Advisors. Nott started his career in wealth management at United Capital Financial Advisors.

"My career began during the global financial crisis, where I learned the value of crafting a financial design that is not only aligned with client goals, but that is structured to encourage a long-term focus on generational wealth creation and preservation," said **Nott**. "I'm excited to be joining Angeles Wealth, and its team-oriented approach, that maintains a culture of constant growth, learning and improvement."

Nott's arrival at Angeles Wealth caps off a sixth consecutive year of strong growth, as the firm's assets under management (AUM) now exceed \$1.7 billion, propelled by over 40 percent year-over-year AUM growth in 2023. Angeles Wealth's growth has been wholly organic since its inception, and over the last six years, the firm has achieved a nearly 40 percent compound annual growth rate in AUM.

"Just as an architect purposefully designs a house to withstand the elements, Rick applies a similar approach to financial planning for clients. His process seeks to provide stability and a runway for building and protecting multi-generational wealth," said [Jonathan Foster, President and CEO of Angeles Wealth](#). "The enemy of planning is emotion, and Rick's focus on the long-term view will help our clients navigate their wealth across generations."

In the past year, Angeles Wealth has continued to bolster its private wealth team to better serve its UHNW and philanthropic clients. Most recently, Angeles Wealth announced [Edward Lowndes](#) as Chief Operating Officer and Chief Compliance Officer to oversee the firm's flourishing operations. Angeles Wealth also elevated [Chloe Wohlforth](#) to partner, a role in which she will continue to advise family clients on financial planning and investment management.

For more information about Angeles Wealth Management and its sophisticated, customized, global investment solutions and wealth management services, please visit [our website](#).

About Angeles Wealth Management

Angeles Wealth Management is a national, SEC-registered wealth management firm serving generationally wealthy families. Providing ultra-high-net-worth families with comprehensive wealth advice and institutional-quality investment solutions typically available to large institutional investors, the firm's private wealth clients gain access to an institutional caliber investment process and opportunity set by investing alongside its affiliate, Angeles Investment Advisors, with total assets of \$40 billion, including \$6 billion of fully discretionary assets under management and the remainder in consulting assets. Angeles Investment Advisors is an advisor to prestigious endowments, foundations, and institutions. Angeles Wealth works with the families it serves to understand their unique needs, including generational planning, family dynamics and charitable goals. Founded in 2011, Angeles Wealth is headquartered in Santa Monica, and has offices in New York City and Houston. For more information, follow us on [LinkedIn](#) or visit [our website](#).

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Disclosures

1) Angeles Wealth Management, LLC is an investment advisor registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Angeles Wealth Management's investment advisory services can be found in its Form ADV Part 2, which is available upon request.

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3) Assets include assets under management and assets under advisement. Assets under advisement refers to assets on which the firm provides advice or consultation but for which the firm either does not have discretionary authority or does not arrange or effectuate the transactions. Assets under advisement could also be those which we monitor for a client on a non-discretionary basis, where we may make recommendations but where the client is the party responsible for arranging or effecting the purchase or sale.

4) The opinions expressed are those of Angeles Wealth Management Investment Team. The opinions referenced are as of the date of publication and are subject to change due to changes in the market or economic conditions and may not necessarily come to pass.