(l-r) John Morreale, CFP®, CMFC, Investment Advisor, Founding Principal; Laurel Mann, CFP®, CMFC, Wealth Manager; Tiffany Nekritz, Relationship Manager; Shilpa Patel, Operations Specialist; Lauren Rivera, Relationship Manager; Mark Larsen, CFP®, CMFC, CEO, Founding Principal; Bonnie Larsen, CCO, Managing Director, Founding Principal; Laura Sillen, AIF®, Investment Advisor, Founding Principal

A Pure Vision

Purus Wealth Management offers transparency and “Life Concierge” approach.

In January 2015, four long-time business partners set out to build a straightforward, transparent investment management company. And that’s precisely what they did when they formed Purus Wealth Management, LLC, an independent Registered Investment Adviser.

“We’ve known each other for a long time, and we’ve known our clients for a long time,” explains Mark Larsen, CFP®, CEO, and one of Purus’s four founding principals.

“Purus means ‘pure’ in Latin,” he says. “We have built a company whose success is directly tied to the success of our clients. We get up every morning and perform for them. When our clients win, we win.”

Sometimes performance means more than giving expert financial advice. Purus’s wealth managers take on a “Life Concierge” role, which may involve stepping in to help clients sort out difficult circumstances or unexpected events.

“We’re committed to helping,” agrees Bonnie Larsen, managing director and chief compliance officer. “Our purpose is to empower people to achieve the life and legacy they want.

“We take a Life Concierge approach,” she adds. “Our clients call us at the best times and the worst times of their lives. The relationships that we’ve cultivated through the years make us their first thought when life events happen.”

“Often, we field conversations that don’t have anything to do with a client’s account,” observes John Morreale, CFP®, investment advisor, and founding partner.

It could be something as simple as changing a lightbulb, as complicated as selling a business, or as sensitive as helping a widow understand her rights and uncover and claim all of her survivor benefits when her spouse unexpectedly passes, Morreale explains.

“We’re a sounding board for our clients in challenging times,” agrees Laura Sillen, AIF®, investment advisor, and founding principal.

“Many of our clients are multigenerational,” she notes. “The biggest compliment we receive is when someone refers their parent or child to us, because we know those are the people they’re most protective of.”

Purus likes to get involved. As an example, wealth manager Laurel Mann, CFP®, heads up the Executive Women Exchange (EWE), a Purus program whose charter is to put on social events that provide opportunities for women to be supportive of each other in a way that allows everyone to be more successful.

To ensure consistency and continuity, Purus continues to recruit the next generation of advisors and has invested heavily in state-of-the-art client management technology. Their efforts haven’t gone unnoticed by their professional peers. The firm received Citywire USA’s Future 50 Award, which honors registered investment advisory firms that best represent its editors’ vision of the wealth management industry’s future. And in 2019, Purus was one of only four firms nationwide honored with Charles Schwab’s Operational Excellence Award, which recognizes independent advisory firms “for superior use of technology to increase firm productivity and efficiency, enhance and modernize the client experience, and shield employees and clients from fraud,” according to a release from Schwab Advisor Services.

“That was a big deal for us,” says Bonnie Larsen. “We continue to focus on process improvements.”

“Process improvement helps us provide exceptional client service,” adds Mark Larsen. “We reach out to our clients regularly. We conduct quarterly calls and annual reviews with each one.

“We’re here to serve them,” he continues, “and if we have to work a little late or meet on a weekend, we’ll do that. Some of our most meaningful conversations have been held in our clients’ homes at their family kitchen table.”

Purus Wealth Management is a Registered Investment Adviser. Advisory services are only offered to clients or prospective clients where Purus Wealth Management and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Purus Wealth Management unless a client service agreement is in place.

PURUS
wealth management

4675 MacArthur Court, Suite 770
Newport Beach, CA 92660
949-356-6330
puruswealthmanagement.com