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ORANGE COUNTY FINANCIAL PROFILE

Six Heads are Better than One

The combined talents of its advisors and support staff make Hendren-Mattern Wealth Management Group of Wells Fargo Advisors a top choice for affluent families across the United States with complex financial lives.



Long-time friends and colleagues Matthew Hendren, Managing Director -Investments, and Erik Mattern, Managing Director -Investments, built Hendren-Mattern Wealth Management Group of Wells Fargo Advisors on a shared set of values. Raised in Orange County, these former Division I college baseball athletes developed a strong work ethic, learned to work under pressure, and experienced the importance of teamwork on the baseball field. These skills were further emphasized by careers at top financial firms that prioritized meaningful client relationships and world-class service.

After a decade in the financial sector, the like-minded duo came together, creating their firm under Wells Fargo Advisors in 2009. “There is no other full-service investment company that better matches our intense client focus, unbiased advising philosophy, and world-class services for affluent families and businesses,” says Hendren.

Teamwork is Everything

In addition to Hendren and Mattern, the team includes two additional financial advisors, Bill Meyer and Dan Foley, and two client associates, Lisa Castillo and Victoria Job. They work together to bring their collective talents to the table to serve high net worth individuals, business owners, and families. As of January 1, 2025, the group manages over \$1.4 billion in assets. Hendren-Mattern Wealth Management Group has a reputation for investment plans that help address specialized needs such as estate and legacy planning strategies, asset diversification, cash flow

management, complex tax strategies, executive compensation, liquidity events, inheritances, business valuation, philanthropic services, and others.

The team works with their clients’ pre-existing network of trusted advisors—including attorneys, CPAs, insurers, and others. For clients with gaps in their support team, they can recommend qualified professionals and, importantly, tap into the premier resources of Wells Fargo Advisors.

With Wells Fargo Advisors specialists just a phone call away, high-level advisors are always within reach. As a result, Hendren-Mattern Wealth Management Group can scale up as clients build their wealth and flourish.

“Orchestrating all the various elements of an investment plan helps ensure everything works together. Changes in one area, such as a career move or market volatility, mean the rest of the plan needs to adjust to compensate,” adds Mattern. “Teamwork is at the center of what we do.”

Assets: Organized, Optimized

The advisors of Hendren-Mattern Wealth Management Group protect the interests of their clients. Recommendations, made once advisors know their clients’ needs, are strictly based on what’s in the best interest for the client.

“Simplicity and clarity are trademarks of our comprehensive investment plans,” says Mattern. “While the solutions may be extremely complex, we make it easy to understand—no financial jargon, just plain English.”

Active communication over the years

allows the team to be proactive, getting ahead of anticipated changes. Advisors regularly serve as a sounding board for clients making difficult life decisions. Questions are often financially based, but just as often, they delve into personal issues that include the client’s second and third generations. Clients have expressed their desire to have the same financial advisors handle their next generation of family. The team is designed to manage second and third generations of their clients’ families.

“Fostering lifelong relationships is critical to our clients’ long-term success,” says Hendren. “When an investor starts building trust with an unfamiliar advisor, carefully planned strategies can be disrupted. Our team is made up of exceptional, experienced advisors able to keep serving our clients, their children, and their grandchildren for decades to come.”

HENDREN-MATTERN

WEALTH MANAGEMENT GROUP

of Wells Fargo Advisors

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