



Mark Moehlman is responsible for servicing his clients as well as developing additional financial advisors and other strategic partnerships within Newport Beach. He holds an MBA from the USC Marshall School of Business, and has dedicated his entire business career to helping others manage their wealth. Mark was born in Los Angeles and moved to Newport Beach in 1975, and has lived in Big Canyon for the past fifteen years. Mr. Moehlman founded Wealth Management Corporation, the first of its kind, in 1987, the same year he launched his Wealth Management Forum. Mark served as a trustee of the Orange County Employees Retirement System (O.C.E.R.S.) from 1993 to 1996, helping shepherd the fund virtually unscathed through the county's bankruptcy. Mr. Moehlman was the Founding Chair of the Center for Investment and Wealth Management (C.I.W.M) of the UC Irvine Merage School of Business, and continues to be very active in both C.I.W.M. and the UCI Chancellor's Club. Mark is married to Dr. Cherilyn Sheets, a prominent Newport Beach dentist, and has one daughter, Melisa, who lives and works in New York City.