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**FOR IMMEDIATE RELEASE**

***EP WEALTH ADVISORS PARTNERS WITH WEALTH PARTNERS CAPITAL GROUP TO MEET INVESTOR AND ADVISOR DEMAND FOR HIGHLY PERSONALIZED WEALTH MANAGEMENT***

***Firm will make a Minority Equity Investment in EP Wealth Advisors to Enhance Client Experience and Support Growth Strategies***

**TORRANCE, CA** (July 10, 2017) — EP Wealth Advisors, a leading independent registered investment advisor based in Torrance, California, today announced a strategic partnership with Wealth Partners Capital Group, LLC (“WPCG”) of West Palm Beach, Florida that will support client demand and growth goals. WPCG will make a minority, non-controlling equity investment in EP Wealth Advisors. EP Wealth Advisors will continue to run day-to-day operations.

Founded by boyhood friends Derek Holman and Brian Parker, EP Wealth Advisors currently operates eight regional offices throughout California, Colorado and Washington. From their early days, Holman and Parker saw an opportunity to provide objective financial advice in the best interest of clients. Since then, EP Wealth Advisors has become one of the most dynamic independent wealth management firms in the country. Together with EP Wealth Advisors’ President Patrick Goshtigian, the team has grown the firm to nearly \$3 billion in assets under management. EP Wealth Advisors intends to draw on WPCG’s expertise and resources when acquiring other client-centric advisory firms, expanding services, hiring of additional advisory personnel, and investing in technology.

“While many in our industry are adopting more robo-based investment services, we’re doubling down on personal touch,” said Patrick Goshtigian, president of EP Wealth Advisors. “Money and investments are highly personal issues, and our advisors and staff are driven to make an impact on our clients’ lives and look after all aspects of their financial health. That requires tremendous support. We help advisors by handling back office support, investment management, financial planning, and other non-advisory aspects of running an independent, fiduciary firm.”

“EP Wealth Advisors has built an outstanding organization with the rare ability to scale and still deliver customized solutions,” said Rich Gill, Senior Partner of WPCG. “What Derek, Brian, Patrick and the EP team have put together is the model for what a wealth management firm needs to look like going forward: fee-only, with dedicated operational, investment, financial planning, and compliance staff, and a complete focus on providing clients the best advice.”

EP Wealth Advisors was advised on this transaction by Park Sutton Advisors, LLC and by Advice Dynamics Partners, LLC.

**About EP Wealth Advisors**

EP Wealth Advisors, LLC is a fee-only registered investment advisory and financial planning firm based in Los Angeles, California. EP Wealth Advisors manages over \$2.9 Billion in AUM as of June 30, 2017. With

additional offices in the San Francisco Bay area, West Los Angeles, Irvine, California, Seattle, Washington, and Denver, Colorado, the firm provides client-centric financial planning, wealth management, and investment management services to individuals and businesses. For more information, visit: [www.epwealth.com](http://www.epwealth.com)

#### **About Wealth Partners Capital Group**

Wealth Partners Capital Group (“WPCG”) is a financial services holding company, which has partnered with three leading wealth management firms via minority equity investments. The WPCG management team is led by partners John W. Copeland, Rich Gill and Sean Bresnan. [www.wealthpcg.com](http://www.wealthpcg.com)