EPIC TRUST
INVESTMENT ADVISORS LLC

Blog

Meet the Team

Creating a Financial Plan Helps You Invest Wisely, Retire Confidently, and Enjoy Life!

Schedule Your Planning Session Today

Featured In

FORTUNE
NBC
Forbes

Life's Too Short To Be Worried About Money

Don’t waste time being confused, embarrassed, or stressed over money.

You deserve better.

Get a Financial Plan

You've worked hard and saved, but is it enough? Here's what you can do to be sure you're on track...

Create A Plan

We Believe Y**ou have the right to know where you stand financially**. Our job is to crunch all the numbers so you can *finally* say "Goodbye" to the Anxiety or Embarrassment of not knowing if you're on track for retirement.

Invest Wisely

Whether you're enjoying retirement today or have 20 years to go, **your investments matter** and we're here to help you make sense of all your options and the ones that are right for your specific circumstances.

Retire Confidently

Yes! – You've got this!

Imagine what it will feel like when you know you've done what it takes to Retire in Style. It takes careful planning, consistent saving, and a lot more to get here. We'll work together to make it happen.

Enjoy Life

Have you decided what Retirement is going to look like for you yet? Whether it's a house on the lake, traveling the world, enjoying your grand kids, or just loafing around the house – We'll help guide you there! Bon Voyage!

I'm In - Let's Make a Plan!

When You Work With Us You Become Family!

We don't just care about your money, We care about You!

We've Helped Hundreds of Families Plan for and Transition into Retirement. We're Confident We can Help You too!

Getting Your Financial Plan is Simple...

Step 1:

Schedule

Our wonderful staff will let you know what you need to bring for your first visit and get your appointment on the schedule to meet with one of our advisors.

Step 2:

Discover

In your first appointment we dive deep into your goals and get to know each other. Together we decide if it makes sense to move forward with the planning process. If yes, you invest in your plan and we get to work.

Step 3:

Plan

In your 2nd appointment, we review your goals and show any road blocks to retiring on time. You will know if your current investments match your actual risk tolerance and we'll advise on what tweaks can be made improve it.

Step 4:

Implement

Now that you know where you stand, and have a clear picture of where you want to be, You choose how to implement your plan. you can do it on your own or give us the pleasure of guiding you on that path.

Schedule Now

Want to know if you're ready?
Download the Retirement Readiness Checklist...

DOWNLOAD FREE CHECKLIST NOW

How Does a Financial Plan Help You?

It's a Powerful Way to Know Where you Stand and What you Need to Retire!

Financial Goals

We ask questions to know the reasons behind your great savings habits. This lets us know your vision of how you want your money to serve you so you can enjoy life in retirement. We ask questions to know the reasons behind your great savings habits. This lets us know your vision of how you want your money to serve you so you can enjoy life in retirement.

Accounts & Portfolios

We get an in depth look at what financial vehicles you're using, and whether it would be appropriate to add horse power or more safety features.

Income & Taxes

We figure out what income streams will be available to you in retirement and how to best utilize each one. Then we run a Tax Clarity Report to let you know how taxes will effect your income in Retirement and determine ways to minimize their effects.

Tracking

We care that you hit your goals. We monitor your progress to make sure your alignment stays straight into Retirement and beyond.

PHONE

(509) 591-0014

ADDRESS

8656 W Gage Blvd STE 104, Kennewick, WA 99336
