We are excited to announce our partnership with Conlon Dart Wealth Management.

EP's partnership with Conlon Dart Wealth Management was created to facilitate more one-on-one time between you and your advisor. This enables your advisor to continue to work towards helping you achieve your financial goals.

You will continue to have your same advisory team supporting you. As a result of the new partnership, you will also have access to these services:

- **Chartered Financial Analyst® Investment Expertise –** EP dedicates an in-house investment team run by six CFA® charterholders.
- **Customized Investment Strategies –** You will gain access to a range of investment management strategies that strive to meet all income goals and a team who specializes in active and passive investment options, individual stocks and bonds, exchange-traded funds, mutual funds and more.
- **CERTIFIED FINANCIAL PLANNER™ Support –** A dedicated financial planner will support your existing advisor

- **Investing In Women –** EP's initiative addresses women's distinct planning needs, including longevity, unique risk profiles and an increased share of the family wealth, as well as employing specific, research-backed communication strategies to ensure women's proper representation in the overall financial planning process.
- **Personal Financial Website –** EP clients have secure links to all financial accounts to provide you with a comprehensive picture of your net worth, budgeting and goals in real-time.
- **Informed Investor Events and Newsletters –** EP provides ongoing access to educational webinars, "Informed Investor" events and quarterly newsletters.
- **Client-Centric Culture –** We are a network of professionals who care deeply about you, your goals and your legacy and will collaborate to help you achieve ultimate peace of mind.
- **Fee-Only Fiduciary –** You have a partnership with a fee-only fiduciary with both legal and ethical duties to act in your best interest.

We believe everyone would live a better life if their finances and investments were in order. Our mission is to help make this world a reality. We do so by providing our clients with the peace of mind that comes with having a comprehensive financial plan in place that's intended to help achieve your life goals.

We're here to answer any questions, and your advisor's contact information can be found below:
– Mitch Conlon: mconlon@epwealth.com
– Stephen Dart: sdart@epwealth.com
– Rick Bryan: rbryan@epwealth.com
– Joe Boden: jboden@epwealth.com

For client access to the investment portal, click here.

We look forward to partnering with you and your family today and for years to come. Welcome to EP!

Best regards,
Patrick Goshtigian
President and CEO of EP Wealth Advisors Family

To learn more about our partnership, click here

How can we help?

Name*

First

Last

Phone*

Email Address*

Questions

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