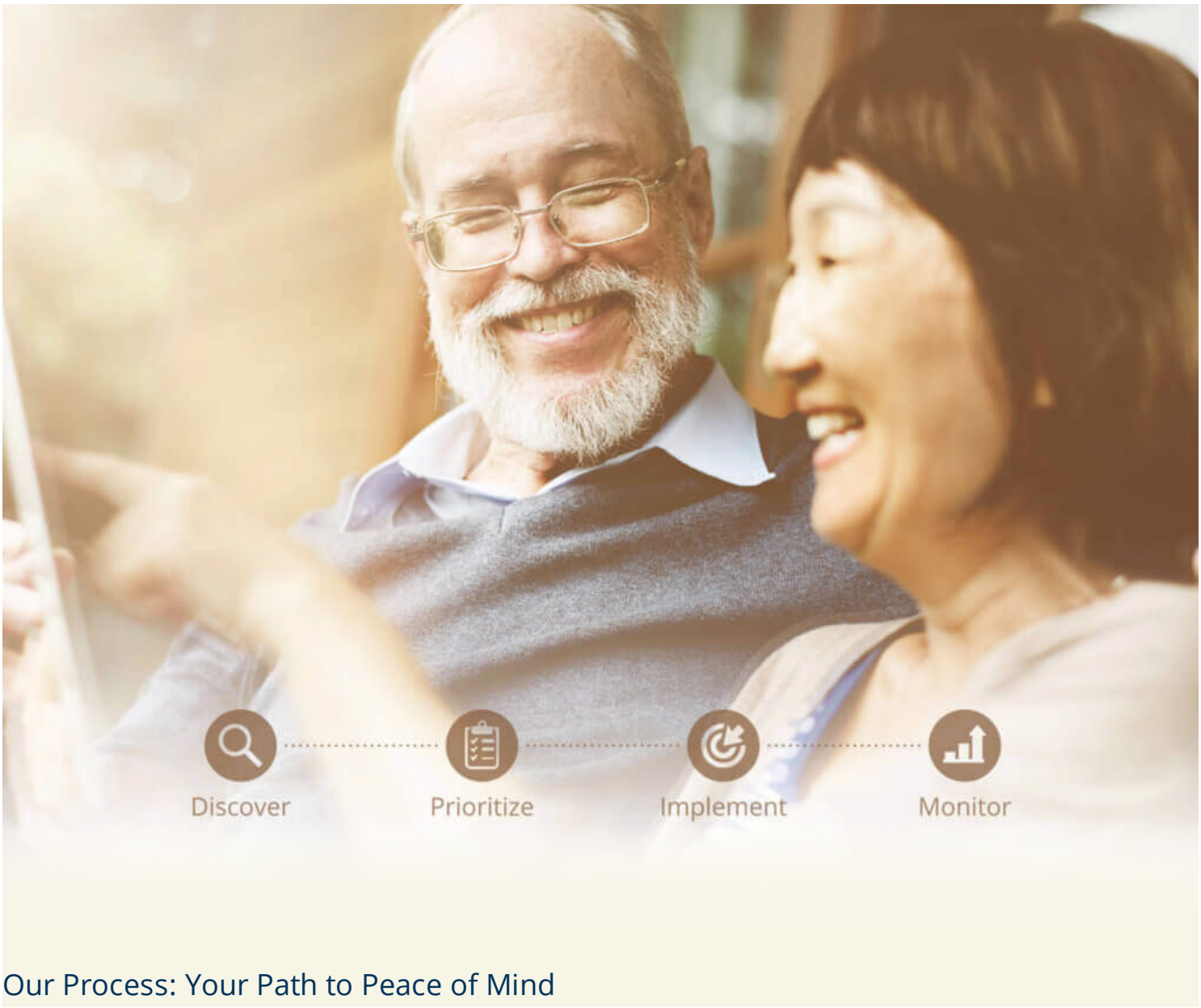
Is your financial advisor listening to you? Are you comfortable with the wealth management process?

It is only by listening and understanding that we can build you a personalized and comprehensive financial plan. In collaborating with you, we create a framework that allows us to make thoughtful and prudent decisions. It's the one way to truly manage the many components of your financial future—not just to meet your financial goals and objectives, but also to fulfill your aspirations.



Our Process: Your Path to Peace of Mind

EP Wealth's Peace of Mind Planning Model is our cornerstone wealth management process intended to help you build a more solid financial future

Discover

We spend the time with you to develop a comprehensive understanding of your current needs, future goals, and personal or family ambitions—the crucial context needed to plan, invest and forge an effective partnership.

Prioritize

You'll receive a tailored financial plan that organizes your financials and defines your goals. This financial foundation allows us to make thoughtful decisions together that are in your long-term best interest.

Monitor

Our goal is to limit the surprises, and our responsibility is to continually keep you informed through transparent reporting and proactive recommendations aligned to your goals and objectives. When you have questions, we will be there to help you.

Our Services

In all of our wealth management services we analyze your unique circumstances and make sure we are working towards your identified goals. As fee-only advisors, we strive to make the process simple and transparent.

Investment Management

Advisors can help you with any decision with a dollar sign, and create a personalized plan for you to achieve your goals.

Retirement Planning

How much do you need to retire? And what do you need to do? At EP Wealth Advisors, we help answer questions like those and integrate them into your personal financial plan and portfolio allocation with the goal of guiding you to a meaningful retirement.

Social Security Planning

Managing the complexities of the Social Security system can be tricky. At EP Wealth Advisors, we help create a social security claiming strategy based on your assets, income streams, marital status, and financial goals.

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Tax Planning

As your wealth increases, your taxes may increase in complexity. At EP Wealth Advisors, we work with you and your CPA to show tax projections that integrate income taxes, capital gains tax, required minimum distributions, and additional taxes so you can see how your decisions today impact your tax decisions in the future.

Life Transition Planning

Major life changes like marriage, divorce, inheritance, birth of a child, widowhood, or a sale of a business can be emotional and even change the goals in your life. At EP Wealth Advisors, we guide our clients through these uncertain times by listening and simplifying financial decisions so that all involved have financial guidance as they transition into the next phase of life.

Real Estate Analysis and Planning

How can you afford that dream home? Is the debt on your current home structured properly? Do you have clarity on the cap rate and income performance of your real estate investments? At EP Wealth Advisors, we can help answer your real estate questions, and make sure that your real estate fits into your financial plan and investment portfolio. CONTACT US FOR MORE...

Estate Planning

Protecting your estate and preserving your legacy can be a complicated process with the shifting tax codes and regulations. At EP Wealth Advisors, we work with you and your Estate Attorney to craft an overall plan to establish financial security for your heirs, estate tax planning, and direct donations to your most meaningful philanthropic causes.

Small Business Financial Planning

Advisors, we analyze the vesting schedules, concentrations, selling restrictions, and tax implications to provide you a recommendation that fits into your financial plan and portfolio. CONTACT US FOR MORE...

Insurance Analysis

Who likes reviewing the intricacies of health insurance, life insurance, umbrella insurance or any kind of insurance for that matter? We do. At EP Wealth Advisors, we identify your risk and make insurance recommendations in line to protect your financial plan. CONTACT US FOR MORE...

Investing in Women

We know everyone is different and that often women face unique financial challenges. We also know these challenges are constantly changing. Today, women typically live longer than men, earn less than men, invest at a lower rate than men and can get a “motherhood penalty” of 10% pay reduction for raising kids. At EP Wealth we don’t just talk about these challenges. Our cause and calling is to partner with you to understand your challenges, to make positive change happen and see results, no matter your gender. CONTACT US FOR MORE...

Personal Financial Website

Organizing your personal information can be the most overwhelming part of financial planning. We provide our clients a personal financial website for you to track investments, cash flow, and credit card awards in real time and securely store important documents like estate plans, trusts, and tax returns, all in one place. This tool allows you and your advisor to review your overall financial plan, asset allocation and individual investments anytime so when you need to make a financial decision, you have the information to make a prudent decision. CONTACT US FOR MORE...

Financial Education

The better informed you are, the more prudent your decisions will be. Through every step, we help you better understand your financial situation with one on one reviews, investment newsletters and our twice annual Market Outlook events. LEARN MORE...

Our Fundamental Principles

Simplicity

Our goal is to simplify your financial life. Achieving your financial objectives can involve numerous components. Bringing them all together through a team that understands the big picture can significantly simplify your life. We've built our Peace of Mind (POM) Planning Model to serve as a comprehensive approach to managing all of your financial needs. This includes the way different life stages can change your goals and needs. So when new issues arise in your life, we're well prepared to address them.

Transparency

Seeing is believing. That's why EP Wealth's POM Planning Model is so valuable: you'll see the steps in the process beforehand so you know what to expect. And you'll receive quarterly reports and participate in an annual review so you have a clear understanding of your progress and will address any changes in objectives. Our own approach to business is transparent as well. We're fee-only advisors—with no products to sell. Because your success is our success, you can be confident that our recommendations are always in your best interest.

Purpose

It's the why of wealth that ultimately matters. We're here to help you focus on the "whys" that matter most to you, and arrange your financial resources to achieve them. Whatever your priorities—from financial security

Meet the EP Wealth Advisors Team

We have offices, wealth management services, financial advisors and financial planners located in Torrance South Bay, Northern California's Bay Area, Southern California's Orange County, San Diego, Valencia, West Los Angeles, Seattle, Washington, and in Denver, Colorado.

First

Last

Phone*

Email Address*

Questions

Submit