



**Our core purpose is
to invest wisely,**

**improve lives, and
create opportunities
by connecting
people, ideas and
capital.**

**INVESTMENT COUNSEL, PORTFOLIO
MANAGEMENT,
SOLUTION-DRIVEN ADVICE**

LIVE AN EPIQ LIFE

Is your life what you thought it would be? What you planned for?

While success and happiness are defined differently by each of us, we believe the two are inextricably linked, and it is this link that defines our professional commitment to our clients. Our approach to investment is designed to guide you towards realizing your individual financial goals now and throughout all the stages of your life.

VALUES

Dedication to building long-lasting partnerships

EPIQ's diligent approach to financial analysis is an expression of the values we share with each other, our partners and our community. We

PROCESS

Meeting our partners' specific needs and aspirations

We begin by building an understanding of you, your needs and your aspirations.

DIFFERENTIATION

Peerless alignment with superior intimacy and advocacy

Our managing partners believe client intimacy and professional advocacy are what makes this

pursue outcomes that are the best of what is possible by being thoughtful, creative and open-minded. Our transparent and conflict-free structure supports meaningful, mutually beneficial relationships.

Then, we create a detailed strategy tailored just for you. Our investment advice includes thoughtful recommendations based on our financial expertise, always putting investment merit first.

firm special and different from other investment firms. As committed investors in your success, we are driven to deliver the best of what is possible while offering a retainer-based service model that provides the highest level of transparency and alignment.

FINDING THE RIGHT PARTNERS IS WHAT MAKES OUR WORK MEANINGFUL

We are dedicated to building lasting partnerships with successful individuals who are pursuing financial peace of mind.

EXECUTIVES

PROFESSIONALSINTELLECTUALS

As a busy owner/entrepreneur or executive you don't have time to worry about managing your financial affairs. Our team of professionals keep your investments top of mind as effective stewards of your wealth so that you can focus on what matters most; your business.

Attorneys, accountants, physicians and other professionals find our straightforward, no-nonsense approach refreshing within an industry that does not always reflect the values and principles by which our team lives.

For those thoughtful investors meticulously exploring all available options, our conflict-free advocacy and ability to think above and beyond can provide a clarity to investing supported through authentic partnership and an unmatched value proposition.

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