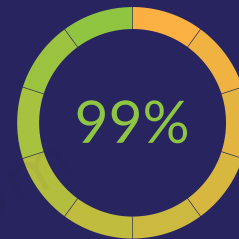


EP Wealth Advisors

TRUST SCORE



EP Wealth Advisors, federally registered in 1987, is a Registered Investment Advisor (RIA) in 23 state(s) with a licensed staff of 40 advisors. EP Wealth Advisors manages \$3.6 billion and provides investment advisory services for 2,595 clients (1:65 advisor/client ratio).

EP Wealth Advisors requires a \$500,000 minimum investment.

BENEFITS

- Firm does not have any felony convictions
- Firm does not have a disciplinary history
- Firm uses a transparent fee-only model
- Firm has been federally registered for 31 years
- Firm has \$1B or more in assets under management
- Communications sent to the firm's website are secure and encrypted
- Firm does not have any misdemeanor convictions
- Firm does not have an insurance agent conflict
- Firm does not privately manage or own the products they recommend
- Firm does not offer proprietary products
- Firm does not have an attorney conflict

CONSIDERATIONS

BENEFITS (cont.)

Firm does not accept performance-based fees

Firm does not perform side-by-side management

Firm does not receive soft dollar benefits

Firm provides mobile-friendly experience for their clients

CONSIDERATIONS (cont.)