investor.com

EP Wealth Advisors

TRUST SCORE

99%

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.)