EP | WEALTH ADVISORS

NEWS

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Bennett Gross, CFA®

Bennett Gross, CFA, Joins EP Wealth Advisors

Los Angeles – February 14, 2012 - EP Wealth Advisors (EPWA), a fee-based financial planning and investment management firm with $1.1 billion in assets under management, announced that Bennett Gross, CFA® has joined the firm as an investment strategist. “Bennett is a seasoned professional with long-standing relationships with his clients,” said Patrick Goshtigian, president of EPWA. “He is a great addition to our team and his decision to join the firm marks another step on our growth trajectory.”

Gross has 25 years of experience working with high net worth individuals in the Los Angeles area. He began his financial services career at Morgan Stanley and has worked at both small and large firms meeting the needs of wealthy clients. Managing portfolios and setting asset allocations for clients for more than 20 years, he was Co-founder and Chief Investment Officer of Windward Capital Management Co. More recently, Gross chaired the Investment Policy Committee for Financial Management Advisors and, before joining EPWA, was Director of Wealth Management at Pacific Wealth Advisors.

Gross began his career as an economist for Orange County, California. He has a bachelor’s degree in economics from the University of California at Irvine, and a master’s degree in business administration, with an emphasis in finance, from the University of California at

Berkeley, where he was elected to the Beta Gamma Sigma honors society. Gross also holds the Chartered Financial Analyst designation.

About EP Wealth Advisors

EP Wealth Advisors is a fee-based Registered Investment Advisory firm located in Torrance, Calif. With $1.1 billion in assets under management, the firm provides financial planning, wealth management and investment management services to a wide range of clients. The company was formed in 2005, with the merger of Premier Financial Management, founded in 1999 by EPWA Managing Directors Brian Parker and Derek Holman, and Enright Financial Consultants, founded in 1982. EPWA was listed among the Top 100 RIA Firms in 2011 by Financial Advisor magazine and AdvisorOne/Wealth Manager magazine.

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