

## EP Wealth Advisors Expands to Phoenix with Latest RIA Acquisition

---

<https://thediwire.com/ep-wealth-advisors-expands-to-phoenix-with-latest-ria-acquisition/>

July 11, 2019



EP Wealth Advisors LLC, an independent registered investment adviser with more than \$4.9 billion in assets under management, has acquired Pathlight Investors LLC, which expands the firm's footprint into Phoenix and the Greater Arizona market.

The acquisition increases EP Wealth's assets under management by more than \$230 million and adds more than 190 clients. Financial and legal terms were not disclosed.



Co-founders Patsy Nodilo, M.J. Nodilo and Adrian Larson formed the company in 2009 to offer advisory and investment services to individuals and families. Nodilo and Larson will each assume the role of regional director at EP Wealth, and Patsy Nodilo will become a wealth advisor.

“Our firm is excited to partner with a talented and energetic team that shares our client-centric approach and emphasis on growth,” observed Patrick Goshtigian, president and CEO of EP Wealth. “We are actively looking for ways to serve a broader range of families and improve our clients’ overall experience. This partnership is very much in line with that mission.”

This is EP Wealth’s sixth acquisition since taking a minority investment from WPCG, a financial services holding company, in July 2017. The firm recently acquired Conlon Dart Wealth Management in Seattle, the firm’s second regional expansion since last year’s acquisition of Donnelly Wealth Advisors in San Diego.

In 2018, the firm also acquired Rampart Wealth Advisors of Greenwood Village, Colorado, Caves & Associates Inc. of Manhattan Beach, California, and Millie Capital Management of Walnut Creek, California.

EP Wealth Advisors LLC is a fee-only registered investment adviser and financial planning firm based in Torrance, California, with additional offices in the San Francisco Bay area, San Diego, West Los Angeles and Irvine, California., Seattle and Denver.

[\*Click here to visit The DI Wire directory sponsor page.\*](#)