# EP Wealth Names New CFO, Promotes Head of Advisor Development

EP Wealth Advisors LLC, an independent registered investment advisor, has hired Chad Sinclair as its chief financial officer and has elevated the responsibilities of Ryan Serrecchia, executive vice president and partner. The pair provide added support to the firm's management team as EP Wealth pursues its acquisition and organic growth plans, the company said.

Sinclair will be responsible for leading EP Wealth's finance team, including the diligence and integration of future acquisitions, as well as strategic evaluation of new service offerings.



He joins EP Wealth from Deloitte & Touche LLP, where he was a manager in the mergers and acquisitions advisory division. He has more than a decade of public accounting experience and served as a M&A specialist for three years. He holds certified public accountant and fellow chartered certified accountant designations.

Serrecchia has advised clients at EP Wealth for more than a decade, and the company said that he played an integral role in developing its five-step client experience process. In his new role, he takes over primary leadership for all advisors at the firm and will provide direction for the firm's business processes and help with the firm's growth strategy.

"As EP Wealth grows, we are committed to adding the right resources that will directly benefit our clients and partners," says Patrick Goshtigian, president and CEO of EP Wealth. "Chad and Ryan will lead the charge on creating smoother transitions for acquisition partners and work toward our goal of fostering a strong team of highly-specialized advisors."

The firm has been active in its recent expansion plans, bolstered by its July 2017 partnership with financial services holding company Wealth Partners Capital Group. EP Wealth purchased Millie Capital Management in Walnut Creek, California in February 2018, adding to its previous acquisitions of Ballou Plum Wealth Advisors in Lafayette, California in January 2016 and Private Capital Management Associates in San Mateo, California in June 2017.

Earlier this month, EP Wealth appointed Goshtigian to serve as its chief executive officer, in addition to his previous role as president of the company.

EP Wealth Advisors is a fee-only registered investment advisor and financial planning firm based in Torrance, CA with additional offices in the San Francisco Bay area, West Los Angeles and Irvine, California, Seattle and Denver. The firm manages more $3.6 billion in AUM as of March 31, 2018 and provides financial planning and investment management services to individuals and businesses.



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