

# 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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## **HC Government Realty Trust Names New VP of Finance and Corporate Controller**

HC Government Realty Trust Inc., a Regulation A REIT that invests in federally-leased properties, has named Jason Post

as its new vice president of finance and corporate controller. In related news, chief financial officer Elizabeth Watson is resigning from the company.

In his new role, Post will be responsible for the REIT's financial management, including corporate accounting, regulatory and financial reporting, budgeting, as well as internal control policies, particularly as they relate to financial risk management.

"Jason joins us at an inflection point in our corporate evolution, as we seek to enhance our efforts with respect to our SEC-qualified Regulation A+ offering and significantly grow our asset base," said Edwin Stanton, the REIT's co-founder, director and CEO.

He added, "Under his direction, Jason's prior company used the Reg A exemption as it prepared for public status. That experience, along with his substantive expertise as both a financial officer at public companies and principal of his own consultancy providing accounting, SEC financial reporting services, and tax and litigation services should be of immediate benefit to our company."

Prior to joining HC Government Realty Trust, Post was the principal financial officer of As Seen On TV, Inc., a direct marketing company. Before that he operated Jason D. Post CPA, PA, a consulting firm offering financial and controller services for pre-IPO and listed companies.

He previously served as CFO of Amacore Group, a marketer of health, life and dental insurance plans, and Zurvita, a distributor of health and wellness products. Post began his career in a series of roles of increasing responsibility at accounting firms Deloitte & Touche LLP; Cherry, Bekaert & Holland LLP; Cavanaugh & Company LLP; and Arthur Andersen LLP.

He is a certified public accountant, a certified fraud examiner, and holds a bachelor's degree from the University of

South Florida.

HC Government Realty Trust was formed in 2016 and oversees a portfolio of 13 properties occupied by federal agencies, including the Drug Enforcement Administration, the Federal Bureau of Investigation, the Social Security Administration, and the Department of Transportation. The company is externally managed and advised by Holmwood Capital Advisors LLC and raised \$5.9 million in investor equity as of November 2017, according to a [filing with the Securities and Exchange Commission](#).

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