



EP Wealth Advisors® Strengthens Presence in California and Arizona Through Two New Acquisitions of Foothills Financial Planning & Wealth Management, LLC and Marble Capital

Newly acquired firms add approximately \$166M to EP Wealth's Assets Under Management (AUM)

TORRANCE, CA. OCT. 10, 2023 – [EP Wealth Advisors®, LLC](#) (“EP Wealth”), a leading independent registered investment adviser (“RIA”) on a mission to provide clients with personalized service through integrated financial planning, investment management and tax and estate planning, has partnered with Arizona-based Foothills Financial Planning & Wealth Management, LLC (“Foothills”) and California-based Marble Capital (“Marble”). By joining EP Wealth, both firms benefit from EP Wealth’s comprehensive suite of services, including financial and retirement planning, as well as EP Wealth’s investment management and research capabilities.

“Both Foothills and Marble share EP’s philosophy of developing lasting relationships with clients built on trust and a true understanding of their unique, individual needs,” said Ryan Parker, CEO of EP Wealth. “These teams join existing EP Wealth regions to strengthen bonds with their respective communities and the clients we serve. Their choice to join is based on their shared understanding that an advisor’s time should be spent doing what is most important, focusing on enriching the lives of clients.”

Phoenix-based Foothills Managing Member and Chief Compliance Officer, Kevin O’Reilly, CFP® will join EP Wealth as a senior vice president and Marble’s Harry Kirsch, CFA, will become a senior wealth advisor in the San Francisco Bay area. Both firms highlighted access to EP Wealth’s extensive suite of services and offerings as key to their decision to partner with the national firm.

“EP Wealth’s comprehensive services, technology and service were only a part of the reason we decided to move forward with the acquisition,” said O’Reilly. “The authentic connections and tailored approach to each client is what set EP Wealth apart, as it mirrors the approach deliver to our existing clients.”

“Transitions can be challenging on several levels, however with the myriad of transitions that EP Wealth has experienced, I am confident of a smooth integration,” said Kirsch. “That is why it was exciting to learn about the variety of services and expertise that will now be available to my clients through this partnership with EP.”

EP Wealth’s focus on expanding its capabilities, sourcing top-notch industry talent, and developing new partnerships highlights the firm’s ongoing commitment to enriching their clients’ financial lives. These two partnerships mark EP Wealth’s third and fourth acquisitions this year and the 28th and 29th acquisitions since taking a minority investment from Wealth Partners Capital Group in July 2017. As of October 2023, EP Wealth has grown to 32 offices in 12 states across the nation.

The Foothills and Marble Capital acquisitions will add over \$166 million combined in assets under management. Financial and legal terms of the deal will not be disclosed.

About EP Wealth Advisors

EP Wealth Advisors, LLC (“EP Wealth”) is a fee-only registered investment adviser and financial planning firm with more than 30 offices in 12 states, including California, Washington, Arizona, Utah, Colorado, Texas, South Carolina, Illinois, Pennsylvania, Massachusetts, New Hampshire and Maine. The firm manages more than \$19.5 billion in assets as of June 30, 2023. EP Wealth provides client-centric financial, tax and estate planning, and investment management services to individuals and businesses. Headquartered in Torrance, California, EP Wealth is led by Co-founders and Managing Directors Derek Holman, CFP®, AIF®, and Brian Parker, CFP®, along with CEO Ryan Parker, and Executive Chairman Patrick Goshtigian, CFA. It is backed by Berkshire Partners, a leading private investment firm in Boston. For more information, please visit www.epwealth.com.

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