Advisor Selection Checklist

ADVISOR			
Do I feel my advisor cares about me, my loved ones, and my goals?			
Is my advisor responsive to me?			
Is my advisor proactive?			
Advisor Peace of Mind Rating	/ 3	/ 3	/ 3

FIRM	FIRM #1: EP WEALTH	FIRM #2	FIRM #3
	ep wealth advisors		
Fee-Only Fiduciary	✓		
No commissions on Insurance	✓		
No commissions on Investment Products	✓		
Personal Website and Real Time Financial Aggregator	✓		
Investor Education Events and Newsletters	✓		
Dedicated Financial Planning Department	✓		
Certified Financial Planners™	✓ 17 CFPs on staff		
Employee Benefits and Stock Options Analysis	✓		
Real Estate Analysis	✓		
Social Security Analysis	✓		
College Funding	✓		
Business Planning for Small Business Owners and Executives	✓		
Insurance Analysis	✓		
Medicare Analysis	✓		
Financial Planning Predictive Modeling (Monte Carlo Analysis)	✓		
Dedicated Investment Management Team	✓		
Decisions Made by 7 person Investment Committee	✓		
Active and Passive Investment Options	✓		
In-house Research by CFA® charterholders	✓ 6 CFA® charterholders		
Institutional Research	✓		
Individual Stocks and Bond Strategies	✓		
Liquid Investments	✓		
Transparent Performance Reporting	✓		
Quarterly Reviews	✓		
Firm Peace of Mind Rating	24 / 24	/ 24	/ 24
Total Peace of Mind Rating	/ 27	/ 27	/ 27