

Winston Represented Sloan Investment Management in its Sale to EP Wealth Advisors

JUNE 30, 2024

Winston represented Sloan Investment Management (Sloan), a Dallas-based asset management firm that works primarily with high-net-worth individuals, in its sale to EP Wealth Advisors (EP Wealth), a California-based fee-only registered investment adviser and financial planning firm with more than 35 offices in 12 states. The transaction will provide Sloan with additional resources for growth opportunities while this partnership adds US\$700M AUM, bringing EP Wealth's total AUM in the Dallas region to over US\$1B, and US\$25.2B nationwide.

Less Than 1 Min Read

Related Capabilities

Transactions

Related Professionals



Andrew Betaque



Basil Godellas



Thomas W. Hughes



Scott Landau



Joe Anderson



Andrew P. Homann



Regina A. Maze