

EPIC and Qualified Plan Advisors Announce Collaboration Agreement for the Benefit of Ascende Wealth Advisor Retirement Plan Consulting Clients

SAN FRANCISCO, Calif. and HOUSTON, Texas, Jan. 2, 2018 (SEND2PRESS NEWSWIRE) – EPIC Insurance Brokers & Consultants, the retail property and casualty insurance brokerage and employee benefits consulting subsidiary of EPIC Holdings, announced today a collaboration agreement between EPIC's Houston-based Ascende Wealth Advisors, Inc. (AWAI) and Qualified Plan Advisors (QPA), a division of Prime Capital Investment Advisors. QPA is a federally regulated investment advisor with more than 30 years of specialized expertise in 401k planning advisory services and private wealth management advisory services.



**Insurance Brokers &
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Due to changing and ever evolving regulations, the provision of retirement planning and consulting services has become increasingly more complex and challenging. To respond to these challenges, EPIC investigated a number of options, and felt that aligning themselves with a highly qualified specialty firm would best serve expanding client needs.

The result is a collaboration agreement and partnership with QPA that expands the resources available to both current and future EPIC clients. Under this agreement the AWAI team will become employees of QPA, who will now be utilized as a third party investment advisory partner for EPIC clients requiring these services.

QPA manages a very large retirement practice with offices and specialized resources around the country that will now be available to the retirement consulting team that has been serving Ascende/EPIC clients.

Under the agreement QPA will assume existing AWAI investment advisory contracts, so that clients will have the same service team.

About EPIC:

EPIC is a unique and innovative retail property & casualty and employee benefits insurance brokerage and consulting firm. EPIC has created a values-based, client-focused culture that attracts and retains top talent, fosters employee satisfaction and loyalty and sustains a high level of customer service excellence.

EPIC team members have consistently recognized their company as a “Best Place to Work” in multiple regions and as a “Best Place to Work in the Insurance Industry” nationally.

EPIC now has more than 1,400 team members operating from 50 offices across the U.S., providing Property & Casualty, Employee Benefits, Specialty Programs and Private Client solutions to more than 20,000 clients.

With run rate revenues greater than \$400 million, EPIC ranks among the top 20 retail insurance brokers in the United States. Backed by Oak Hill Capital Partners, the company continues to expand organically and through strategic acquisitions across the country. For additional information, please visit <https://www.epicbrokers.com/>.

About Qualified Plan Advisors:

Qualified Plan Advisors (QPA) is an independent, results driven advisory firm and fiduciary partner, comprised of a team of ERISA attorneys, over 70 advisors and more than 50 professional staff. QPA provides consulting services that are designed to deliver an à la carte experience to plan sponsors with either single or multiple needs. Please visit <https://qualifiedplanadvisors.com/> to learn more.

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