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CULTIVATING WEALTH IN COLORADO

Comprehensive Planning Made Personal

Every client gets the personal attention they deserve at Epiqwest Culver Wealth Advisors, LLC, where comprehensive planning is the highest priority.

Financial planning is a journey, and experienced guidance is paramount in navigating the path to success. That's why Colorado's high net worth families, individuals, and business owners turn to Epiqwest Culver Wealth Advisors, LLC for help reaching their financial destinations.

Backed by over 200 years of combined industry experience, it's easy to see why clients consider Epiqwest Culver their trusted partner for comprehensive solutions and purpose-driven planning. The firm brings together expertise across a full range of capabilities to deliver high-caliber retirement planning, business succession solutions, and sophisticated wealth management services.

Broadening the scope of wealth management, Epiqwest Culver's holistic planning approach incorporates essential elements. From tax planning to life insurance, portfolio management, and more, the firm's team of advisors customizes plans that solve clients' unique needs and provide direction along their path. It's a process that includes more than just offering financial products and services.

"We focus on what other firms overlook, and that's taking the time to really get to know our clients on a human level," says Eric Veve, AIF®, AAMS®, managing partner.

"Trust is the foundation of great financial planning. Building authentic, long-lasting relationships is critical to what we do," adds Trent Culver, ChFC®, managing partner. "Our clients invest more than money and time. They invest the confidence in us to see their plan through for the benefit of their families and businesses."

A History of Experience

With roots that date back over 50 years, clients know Epiqwest Culver has the longevity and experience required to bring their goals to life. Founded in 2020, the firm merged the strengths of long-established practices Epiqwest Financial and Culver Companies under one powerhouse name, a move Mark Culver, managing partner, fondly describes as "getting the band back together."

"My father started in the insurance industry in 1967 and continued to grow his practice by adding retirement planning and investment management in 1982," he says. "Many clients have worked with us from the start of their careers. Now they're retiring as multimillionaires, and that's because they followed the philosophy my father promoted: If you fail to plan, you're planning to fail."

Following his father's footsteps into the financial industry, Mark Culver joined Culver Companies in 1993 to build the firm's fee-based investment management practice. He was soon joined by Trent Culver, who later split off to form the boutique wealth management firm Epiqwest Financial.

Focused on advanced tax, estate, and insurance solutions for high net worth individuals, Epiqwest Financial quickly built a reputation for premier, personalized financial planning and asset allocation. Combined with Culver Companies' personal retirement planning and small business benefits solutions, Epiqwest Culver now offers a fully comprehensive suite of services.

Dedicated, Personalized Planning

At Epiqwest Culver, great planning is rooted in understanding what truly matters most. That means giving every client the personal attention they deserve, starting with an in-depth discovery process that uncovers more than just goals and objectives.

"We bring everything together into one cohesive plan that covers every base. Because we take the time to understand our clients, their plan beautifully represents them as people. And that's different from what they get at other firms," says Veve. "We ask more questions and deeper questions. By knowing our clients well, we're better prepared to provide the holistic solutions they need."

Through insightful discussion, advisors identify key details that speak to clients' motivations and values, two crucial pieces that inform every aspect of effective financial planning. No matter their vision, clients can expect bespoke planning and personalized guidance to achieve it.

"We're small and nimble enough to give every client dedicated attention but large enough to have the right resources to guide their financial journey, including dynamic investment platforms and other technologies that allow for powerful investing options," says Bryan Sullivan, CFP®, managing partner.

With Culver Companies' extensive experience and Epiqwest Financial's specialized capabilities blended under one brand, the full-service firm offers expanded resources to take clients even further. But that's just one way Epiqwest Culver delivers unrivaled service.

"Every advisor provides investment management. Where we've differentiated ourselves is stepping beyond that," Culver says. "We live in an era of independence, one full of opportunities for small business owners and high-income individuals that mainstream advisory firms don't address."

That includes small planning adjustments that make a huge impact on clients' financial futures. "Our team thoroughly examines every aspect of each client's specific economic circumstances, and we structure plans that maximize their resources," he continues. "That's efficiency. And that's our real value add."

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Unrivaled Capabilities and Service

Behind Epiqwest Culver's success is a credentialed service team with diverse skills and knowledge. Supported by analysts, advisors, and other experts with an uncanny ability to champion care for clients, the firm's four managing partners collaborate to cover every facet of financial planning.

"Trent and I both have a wealth of experience in tax, retirement, and estate planning, but we each bring something unique to the table. Trent specializes in insurance as an asset class while my expertise is in succession planning for business owners," Veve explains. "Additionally, Bryan is a CERTIFIED FINANCIAL PLANNER™ skilled across all of our platforms and technologies, and Mark and his team's trading experience ensures every client is best served from the portfolio and investment management standpoint."

Brought together by the merger, "we have so many additional resources on-hand that we didn't have as separate companies. That allows us to focus on our individual strengths as advisors and dedicate more time to building relationships," he adds.

Impassioned to deliver a higher level of care, Epiqwest Culver proudly supports the community it serves. Through charitable initiatives throughout the region, the firm is a valuable resource for clients and the community alike.

"Most of our clients came from other firms, and they chose us not only for our experience but for the authentic relationships we build," says Mark.

"That's the value we bring," Veve says. "We build real human connections and deeper relationships with clients than they've experienced elsewhere. That's Epiqwest Culver."

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