



Epiphany Financial Management...

Was founded to provide daily money management for high net-worth individuals and small businesses that lack resources and time. We do the work so that our clients can spend more time enjoying life or focusing on other aspects of their business.

Our personal cash management service is...



How we do it...



EFM partners with experts to provide our clients with:

- ➔ PERSONAL CASH MANAGEMENT & BILL PAYING
- ➔ DOCUMENT MANAGEMENT
- ➔ DEBT MANAGEMENT
- ➔ CLIENT ADVOCACY
- ➔ PAYROLL PROCESSING
- ➔ BOOKKEEPING SERVICES

We leverage our relationships with financial advisors, estate planners, accountants, attorneys and to expand each of our partner's overall client bases.

As a Financial Professional it is important to understand your client's goals, budget and income requirements, risk tolerance and level of organization. EFM helps make this happen and strengthens your relationship with your client. We adhere to the high ethical standards of the American Association of Daily Money Managers Code of Ethics.