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CAPTRUST and Pensionmark® Announce Strategic Partnership

CAPTRUST Financial Advisors and Pensionmark Retirement Group have announced a strategic partnership designed to create the financial services industry's premier platform for retirement plan advisors. The combined firms are expected to serve more than 3,000 institutional clients with over \$170 billion of assets under advisement.

CAPTRUST Financial Advisors and Pensionmark Retirement Group have announced a key strategic partnership designed to create the financial services industry's premier platform for the nation's best retirement plan advisors. The combined firms are expected to serve more than 3,000 institutional clients with over \$170 billion of assets under advisement at the close of the transaction expected during the second quarter.

Terms of the deal include creation of a new jointly owned entity, which will be Pensionmark's registered investment advisor. CAPTRUST and Pensionmark advisors will continue to offer services independent of one another, utilizing the same tools, services, and infrastructure they offer today.

Senior leaders at CAPTRUST and Pensionmark have identified organizational and operational synergies that should benefit both firms. In addition, they intend to offer jointly developed solutions, such as additional acquisition strategies and business succession planning programs for advisors.

CAPTRUST CEO Fielding Miller said "This alliance creates a home for top-tier advisors that is second to none. Together, we can offer solutions for everyone, regardless of what stage they are in their practice."

In addition to retirement plan services, the new structure gives Pensionmark a more robust wealth management platform to offer its advisors and their clients, with a focus on sophisticated high-net-worth solutions and services.

About CAPTRUST Financial Advisors

CAPTRUST Financial Advisors is an independent investment research and fee-based advisory firm specializing in providing retirement plan and investment advisory services to retirement plan fiduciaries, executives, and high-net-worth individuals. Headquartered in Raleigh, N.C., the firm represents \$160 billion in client assets with offices in Alabama, California, Connecticut, Florida, Georgia, Iowa, Michigan, Minnesota, Missouri, New York, North Carolina, Ohio, Pennsylvania, Texas, and Virginia. To learn more, visit www.captrustadvisors.com.

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