



Thursday, April 30, 2020

CAPTRUST Named to the *Austin Business Journal's* Annual Lists of Top RIAs and Financial Planners

The *Austin Business Journal* recently named CAPTRUST the 10th-largest registered investment advisor (RIA) in the Austin market, as measured by assets under management in the first quarter of 2020. In addition, the firm was named the 15th-largest financial planning firm in the market, ranked by the number of CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals in offices in the Austin area.

The *Austin Business Journal* recently named CAPTRUST the 10th-largest registered investment advisor (RIA) in the Austin market, as measured by assets under management in the first quarter of 2020. In addition, the firm was named the 15th-largest financial planning firm in the market, ranked by the number of CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals in offices in the Austin area, including Travis, Williamson, Hays, Bastrop, and Caldwell counties.

The nine employees—including three CFP® professionals—in CAPTRUST's two Austin offices oversee nearly \$1.4 billion in client assets.

In August of 2019, San Antonio, Texas-based [South Texas Money Management \(STMM\)](#) joined CAPTRUST, bringing more than 60 employees across six Texas offices and \$3.7 billion in client assets to the firm. By joining forces, CAPTRUST has significantly expanded its presence within the state, while continuing to carry on the legacy of STMM chairman Jeanie Wyatt, who passed away a year ago in April 2019.

To see the full listing of the 2020 *Austin Business Journal's* top RIA firms, click [here](#)

To see the *Austin Business Journal's* ranking of financial planning firms, click [here](#).

About CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment

advisor with more than 650 employees nationwide and \$390 billion in client assets. An employee-owned firm, CAPTRUST provides investment advisory services to retirement plan fiduciaries, endowments, and foundations, and comprehensive wealth planning services to executives and high-net-worth individuals. CAPTRUST's mission is to enrich the lives of its clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation. The firm also operates the CAPTRUST Community Foundation, a charity focused on meeting the needs of underserved children.

Legal Notice

This document is intended to be informational only. CAPTRUST does not render legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2020 CAPTRUST Financial Advisors