



Thursday, March 9, 2023

Houston's Monroe Vos Joins CAPTRUST

CAPTRUST Financial Advisors has announced the acquisition of Monroe Vos Consulting, a Houston-based firm that provides advisory services for retirement plan sponsors and high-net-worth individuals. The addition of Monroe Vos brings over \$5.8 billion in assets and a team of 17 experienced colleagues to CAPTRUST's portfolio.

Raleigh, NC—March 9, 2023—CAPTRUST Financial Advisors (CAPTRUST) announced today the addition of [Monroe Vos Consulting](#) (Monroe Vos).

Founded by Jim Monroe and [Tim Vos](#) in 1994, Monroe Vos is based in Houston, Texas, with an additional location in Birmingham, Alabama. The firm provides advisory services for retirement plan sponsors, endowments, and foundations and provides wealth management services to high-net-worth individuals and family offices.

The firm brings its entire team of 17 colleagues to CAPTRUST and more than \$5.8 billion in assets.

"The genesis of Monroe Vos was to avoid conflicts of interest and to put clients first—and the alignment of these values led us to choose CAPTRUST. CAPTRUST's culture and philosophy have a lot of similarities to ours at Monroe Vos. We had commonality when it comes to the care of the client," said Vos.

This addition bolsters CAPTRUST's presence in [Houston](#) and [Birmingham](#), joining the firm's existing wealth, retirement plan, and endowment and foundation practices in these regions. CAPTRUST has had an established presence in Texas for more than a decade and continues to grow, with more than 100 employees. The Monroe Vos deal follows the recent additions of [Covenant Multifamily Offices](#) in 2021 and [South Texas Money Management](#) in 2019.

"Community is also a core value of our firm—we have long participated in volunteering and fundraising. CAPTRUST's care for the community through the CAPTRUST Community Foundation is just another proof statement for why we are an excellent fit together," said Vos. "We have a long future

ahead by joining CAPTRUST, and our clients will benefit from it.”

“Monroe Vos has been a leader in our industry for decades, and we are thrilled to welcome them to CAPTRUST,” said [Rick Shoff](#), managing director of CAPTRUST’s Advisor Group. “Tim and the entire firm bring an experienced perspective across all three of our business lines. We look forward to joining forces in Texas—especially as we continue to expand in this market.”

This deal is the first for CAPTRUST in 2023 and the 64th since 2006. Consistent with other transactions, Monroe Vos will take on CAPTRUST branding. Park Sutton Advisors, a Waller Helms Company served as Monroe Vos’ financial advisor in the transaction.

About CAPTRUST

CAPTRUST is an independent registered investment advisor founded in 1997 in Raleigh, North Carolina. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance services for individuals and families. The firm also offers a comprehensive suite of services for ultra-high-net-worth individuals to simplify their financial lives, mitigate risk, and perpetuate their legacies. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis and fee benchmarking, and employee advice programs. With more than 1,300 employees across 75 locations nationwide, CAPTRUST oversees more than \$125 billion in assets under management and more than \$775 billion in assets under advisement (as of December 31, 2022).

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