

31 CAPTRUST Teams Named to 2022 NAPA Top DC Advisor Teams List

The National Association of Plan Advisors (NAPA) recently named 31 CAPTRUST teams to its prestigious Top Defined Contribution (DC) Advisor Teams list for 2022, highlighting the nation's leading retirement plan advisor firms.

The list is defined by physical locations with at least \$100 million in DC assets under advisement as of December 31, 2022.

Congratulations to the following CAPTRUST teams:

- 1. CAPTRUST Akron
- 2. CAPTRUST Allentown
- 3. CAPTRUST Atlanta
- 4. CAPTRUST Austin
- 5. CAPTRUST Boston
- 6. CAPTRUST Charlotte
- 7. CAPTRUST Chesterton
- 8. CAPTRUST Chicago
- 9. CAPTRUST Clarkston
- 10. CAPTRUST Columbia, MD
- 11. CAPTRUST Dallas
- 12. CAPTRUST Des Moines
- 13. CAPTRUST Doylestown
- 14. CAPTRUST Greenwich
- 15. CAPTRUST Harrisonburg

Page 1 March 20, 2023

- 16. CAPTRUST Houston
- 17. CAPTRUST Orlando
- 18. CAPTRUST Lake Success
- 19. CAPTRUST Los Angeles
- 20. CAPTRUST Minneapolis
- 21. CAPTRUST New York
- 22. CAPTRUST Phoenix
- 23. CAPTRUST Pittsburgh
- 24. CAPTRUST Portland
- 25. CAPTRUST Raleigh
- 26. CAPTRUST Richmond
- 27. CAPTRUST Sacramento
- 28. CAPTRUST Santa Barbara
- 29. CAPTRUST South Michigan
- 30. CAPTRUST Tampa
- 31. CAPTRUST Warren

To see the full listing of Top DC Advisor Teams, click here.

Legal Notice

This material is intended to be informational only and does not constitute 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. It may not apply to all investors or all situations 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.

© 2025 CAPTRUST Financial Advisors

Page 2 March 20, 2023