

33 Teams on 2025 NAPA Top DC List

The National Association of Plan Advisors (NAPA) recognized 33 CAPTRUST teams on the 2025 Top Defined Contribution (DC) Advisor Teams list. The award is based on assts under advisement and recognizes advisor teams for their positive impacts on private retirement systems across the U.S.

This list focuses on advisor teams rather than individuals. NAPA defines teams as being in one location and having a minimum of \$100 million in DC assets under advisement as of December 31, 2024.

Congratulations to each CAPTRUST office listed in the NAPA Top DC Advisor Teams for 2025:

- CAPTRUST Akron
- CAPTRUST Allentown
- CAPTRUST Atlanta
- CAPTRUST Austin
- CAPTRUST Birmingham
- CAPTRUST Boston
- CAPTRUST Charlotte
- CAPTRUST Chesterton, IN
- CAPTRUST Chicago
- CAPTRUST Columbia, MD
- CAPTRUST Dallas
- CAPTRUST Denver
- CAPTRUST Des Moines
- CAPTRUST Doylestown, PA
- CAPTRUST Greenville, SC
- CAPTRUST Greenwich
- CAPTRUST Harrisonburg
- CAPTRUST Houston

Page 1 March 19, 2025



- CAPTRUST Lake Success, NY
- CAPTRUST Los Angeles
- CAPTRUST Minneapolis
- CAPTRUST New York
- CAPTRUST Orlando
- CAPTRUST Pittsburgh
- CAPTRUST Portland, ME
- CAPTRUST Phoenix
- CAPTRUST Raleigh
- CAPTRUST Richmond
- CAPTRUST Sacramento
- CAPTRUST Santa Barbara
- CAPTRUST South Michigan
- CAPTRUST Tampa
- CAPTRUST Warren, NJ

The full list is here.

Disclosure: CAPTRUST teams named on the "NAPA's 2025 Top Defined Contribution Advisor Teams list" were based on advisor team assets. NAPA defines teams as being in one location and having a minimum of \$100 million in DC assets under advisement as of December 31, 2024. CAPTRUST is a paid member of The National Association of Plan Advisors (NAPA).

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 19, 2025