



TOP 50

Barron's Honors 11 CAPTRUST Advisor Teams

We are pleased to announce 11 CAPTRUST advisor teams have been named to the sixth annual [Barron's Top 50 Institutional Consulting Teams](#) ranking. The teams, their lead advisors, and assets under advisement were ranked as follows:

- **#11 Team Schott**, led by [Stephen Schott](#), Hollywood, FL (\$15.6 billion)
- **#14 Team Esch**, led by [Dan Esch](#), Minneapolis, MN (\$24.6 billion)
- **#16 Team Dallas**, led by [John Pickett](#) and [Travis Whitten](#), Dallas, TX (\$30.2 billion)
- **#18 Team Allentown**, led by [Jim Edwards](#), [Jeff Loehwing](#), and [Wes Schantz](#), Allentown, PA (\$24.8 billion)
- **#21 Team Schmitt**, led by [Barry Schmitt](#), Richmond, VA (\$62.9 billion)
- **#23 Team Stanicek**, led by [Jason Stanicek](#), Raleigh, NC (\$27.7 billion)
- **#24 Team Strickland**, led by [Jon Strickland](#), Raleigh, NC (\$14.2 billion)
- **#25 Team Atlanta Perimeter**, led by [Philly Jones](#), [Evan Melcher](#), and [Zack Sadler](#), Alpharetta, GA (\$13.2 billion)
- **#39 Team Eskamani**, led by [Shaun Eskamani](#), Raleigh, NC (\$16.1 billion)
- **#41 Team Strodel**, led by [Jim Strodel](#), Charlotte, NC (\$64 billion)
- **#49 Team Wilt**, led by [Steve Wilt](#), Akron, OH (\$9.1 billion)

CAPTRUST advisors gain two additional spots on the coveted [Top 50](#) list since last year's ranking, with the firm taking up nearly 25 percent of the 50 spots for 2020.

For this ranking, *Barron's* recognizes the nation's top teams specializing in investment consulting for defined contribution and defined benefit plans, endowments, and foundations.



The list is comprised of both independent and wirehouse advisory teams who are exemplary in the industry. Those named were evaluated on a range of criteria, including institutional investment assets overseen by the team, client tenure, revenue generated by those assets, number of clients served by the team, and the number of team members.

Advanced professional designations and professional accomplishments by the team were also taken into consideration.

About CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment advisor with more than 650 employees nationwide and \$364 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 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.

© 2026 CAPTRUST Financial Advisors