



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.

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