



Cammack Retirement Group Joins CAPTRUST

RALEIGH, N.C. – February 16, 2021 – CAPTRUST Financial Advisors (CAPTRUST) today announced that Cammack Retirement Group (Cammack Retirement) has joined the firm. With \$154 billion in assets under advisement (AUA), the addition of Cammack Retirement elevates CAPTRUST's AUA to more than \$600 billion.

Cammack Retirement has a 50-year history of helping retirement plan sponsors fulfill their fiduciary responsibilities and participants achieve a successful retirement. The New York City and Wellesley, MA-based firm, which also has an office in Lexington, KY, brings 38 new colleagues to CAPTRUST. The firm is led by Jeff Levy, Mike Volo, Emily Wrightson, Mike Sanders, and Earle Allen, who all join CAPTRUST as principals.

“Cammack Retirement Group and CAPTRUST are two of the largest firms in the institutional retirement space, with Cammack Retirement serving over 170 plan sponsors, which represents nearly 1.3 million participants,” said Rick Shoff, CAPTRUST managing director, advisor group. “Bringing together our resources and deep expertise makes our offering unmatched in the industry.”

“Becoming a part of CAPTRUST will help us to achieve two of our long-term goals: to expand our geographical footprint and add new lines of business and services for our existing clients,” said Levy. “This exciting next chapter for Cammack Retirement will allow us the opportunity to grow, take on new challenges, and expand career opportunities for our employees.”

“Cammack Retirement and CAPTRUST have decades of experience providing exceptional client service and fiduciary support for plan sponsors,” said Volo. “Our shared values of prioritizing our clients, colleagues, and communities makes joining CAPTRUST a natural fit and will position us to



best serve our clients now and in the future.”

Cammack Retirement Group is the forty-seventh firm that has joined CAPTRUST since 2006 and will take on the CAPTRUST brand moving forward.

About CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment advisor with a mission to enrich the lives of its clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation. The firm provides investment advisory, investment management, and planning services to thousands of private clients and institutional investors such as retirement plan fiduciaries, endowments, foundations, and religious entities. With more than 800 employees across more than 50 locations nationwide, CAPTRUST oversees more than \$60 billion in assets under management and \$448 billion in assets under advisement (as of December 31, 2020).

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