



CAPTRUST Adds Aevitas Wealth

Raleigh, N.C.—May 11, 2023—CAPTRUST Financial Advisors (CAPTRUST) announced today the addition of Aevitas Wealth Management (Aevitas).

Aevitas provides financial planning and advisory services to individuals, families, and small businesses, in addition to advice and investment services for endowments, foundations, and retirement plans.

Based in Wellesley Hills, Massachusetts, Aevitas is led by President and Chief Investment Officer [Michael Schreiber](#). The wealth management firm brings \$567 million in assets to CAPTRUST, along with four new colleagues.

“The way CAPTRUST acts as a fiduciary to its clients was an immediate draw for us. High client contact and care is a priority for our team at Aevitas, and we saw the same priority in CAPTRUST,” said Schreiber.

Since 1987, Aevitas has focused on custom financial and estate planning for clients, and the firm ensures holistic planning and advice by coordinating with clients’ other advisors like attorneys and accountants.

“By joining forces with CAPTRUST, we can create more customized and high-quality financial and investment planning for our clients,” said Schreiber.



Aevitas will join two existing offices in Massachusetts, following the recent additions of PatriotPension Advisors, Boston Advisors Private Advisory Group, Cammack Retirement Group, and RINET Company.

“Our presence in the Northeast continues to grow, especially in the greater Boston area. The addition of Aevitas makes us even more competitive in that market,” said [Rush Benton](#), CAPTRUST’s senior director of strategic growth.

“Michael and the Aevitas team focus on building relationships to create their success—a key value of CAPTRUST, making them a great fit to join the firm,” said Benton.

This deal is CAPTRUST’s third of 2023 and the 66th since 2006. Consistent with other transactions, Aevitas will take on CAPTRUST branding. FP Transitions served as the financial advisor to Aevitas in the transaction.

About CAPTRUST

CAPTRUST was founded in 1997 and registered CapFinancial Partners, LLC as an independent registered investment advisor in 2003 in Raleigh, North Carolina. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance services for individuals and families. The firm also offers a comprehensive suite of services for ultra-high-net-worth individuals to simplify their financial lives, mitigate risk, and perpetuate their legacies. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis and fee benchmarking, and employee advice programs. With more than 1,300 employees across 75 locations nationwide, CAPTRUST oversees more than \$714 billion in assets, including just over \$598 billion in nondiscretionary assets under advisement and just under \$116 billion in discretionary managed account assets. (as of December 31, 2022).

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