



CAPTRUST Closes 70th Deal: Column Capital

Raleigh, NC—October 30, 2023—CAPTRUST Financial Advisors (CAPTRUST) announced today the addition of [Column Capital Advisors](#). Column Capital is based in Indianapolis, Indiana, and manages more than \$1.4 billion in assets.

The wealth management firm was founded in 2005 and is led by President and Managing Director Brian Upchurch and Executive Directors Kevin Sweet and Jeffrey Yu. Twenty-two colleagues will join CAPTRUST. Column Capital's three core offerings for high-net-worth individuals comprise a comprehensive advisory approach of investment management, financial planning, and tax services.

"Philosophically, CAPTRUST was a clear fit. We are moving into the next phase of our business, and this move was important to our longer-term succession plan," said Upchurch. "Employee ownership is really important to us, and CAPTRUST provides expansive career opportunities for our team. Not to mention the array of resources at CAPTRUST that will allow advisors to focus more time on our clients."

"CAPTRUST continues to expand in the major metro markets, and we are excited to add another office in Indiana, this time in Indianapolis," said Rush Benton, CAPTRUST's senior director of strategic growth. "The team at Column Capital will help us build out our existing services like tax and investment management for clients across the firm."

Column Capital is CAPTRUST's first location in Indianapolis. This addition is the second CAPTRUST location in Indiana, joining an existing office in [Chesterton](#), bringing the firm's employee total across Indiana to almost 50.

"Since 2006, we have been strategically adding firms in markets across the U.S., working toward our goal of a wealth management, retirement planning, and endowment and foundation presence in each city," said CAPTRUST CEO Fielding Miller. "This growth continues to enhance the offerings and quality of service we can deliver to our clients."



The addition of Column Capital is CAPTRUST's seventh deal of 2023 and the 70th since 2006. Consistent with other transactions, Column Capital will take on the CAPTRUST brand. Advice Dynamics Partners LLC served as Column Capital's financial advisor 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 nearly 1,500 employees across 85 locations nationwide, CAPTRUST oversees more than \$832 billion in assets, including just over \$688 billion in nondiscretionary assets under advisement and just over \$143 billion in discretionary managed account assets (as of June 30, 2023).

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