



CAPTRUST Adds Eighth Firm in 2021: RINET

Raleigh, N.C.â??December 8, 2021â??CAPTRUST Financial Advisors (CAPTRUST) today announced that Boston-based RINET Company (RINET) has joined the firm. Founded in 1974, RINET has a comprehensive offering for high-net-worth clients, as well as a robust suite of family office services.

RINETâ??s team builds meaningful relationships with the individuals and families it serves, spanning years and multiple generations. The firm is led by [Brian Rivotto](#), [Gary Savage](#), and [Rebecca Pouliot](#), who will be joining CAPTRUST, along with 26 additional colleagues. RINET brings to CAPTRUST more than \$2.2 billion in assets.

â??When we started exploring the next phase for RINET, we were seeking alignment on three core principles that have been our bedrock for nearly 50 years,â?• said Brian Rivotto, RINET managing director and CEO. â??These include providing superior client service, independent and sound advice, and a fee-only structure. It became clear very early on in the process that CAPTRUST not only shared these views but had developed the scale to provide a level of client service that is unmatched in the industry.â?•

Over the past few years, CAPTRUST has built a notable presence in Boston, including the addition of the wealth management division of Boston Advisorsâ?? Private Advisory Group in 2019 and the sizeable Cammack Retirement Group, which added \$154 billion in retirement assets earlier this year.

â??It has been our belief since we began acquiring firms in 2006 that there is a clear benefit to offering both wealth and institutional services within a single market,â?• said [Rush Benton](#), senior director, strategic growth for CAPTRUST. â??This has been one of our main drivers of deals for us



and has helped us to accelerate our integration process when we are growing in markets where we already have a footprint.â?•

RINET is the second firm that CAPTRUST has added this year with a significant offering in family office services, following the addition of Covenant Multifamily Offices in Texas and Oklahoma.

RINET is the 53rd deal that CAPTRUST has completed since 2006, and the eighth firm to join CAPTRUST in 2021, a record for the firm. Consistent with previous firms that have joined CAPTRUST, RINET will take on the CAPTRUST brand moving forward. Steven M. Levitt and Park Sutton Advisors acted as the exclusive financial advisor to RINET.

About CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment advisor. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance for individuals and families. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis/fee benchmarking, and employee advice programs. With more than 1,000 employees across 60 locations nationwide, CAPTRUST oversees more than \$85 billion in assets under management and more than \$660 billion in assets under advisement (as of September 30, 2021).

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.

Â© 2026 CAPTRUST Financial Advisors