



CAPTRUST Adds in Texas: Engrave Wealth Partners

Raleigh, NC January 18, 2024 CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of Engrave Wealth Partners (Engrave). The wealth management firm is based in The Woodlands, Texas, and oversees more than \$770 million in individual client assets.

Ten Engrave colleagues will join CAPTRUST, including Co-founders Greg Parker and Taylor Parker. The firm serves as a fiduciary to hundreds of clients focused within Texas, Louisiana, and California, with an emphasis on retirement planning for individuals, including tax planning and estate planning.

"We recognized the challenges of continuing to serve our existing clients at the highest level while continuing to grow," said Greg Parker. "Ultimately, we were looking for a partner who could help us deepen our offering to existing clients while accelerating our organic growth strategy."

The majority of Engrave's client base are corporate professionals or small business owners nearing or in retirement, many with a background in the oil and gas industry. The team places a strong focus on tax planning and proactively preparing these high-net-worth individuals for retirement. This transaction marks the second CAPTRUST office in Houston Monroe Vos Consulting joined the firm in 2023.

"The resources we are most excited to access at CAPTRUST are the investment and tax services," said Taylor Parker. "They will significantly deepen the expertise we can offer and will elevate the experience we provide to our clients."

CAPTRUST has continued to grow in Texas over the past year, with the addition of two more firms in 2023: Omega Wealth Partners and Southern Wealth Management. The firm now has more than 170 employees in the state.

"The team at Engrave expands our offering in the Houston area with wealth management services," said Rush Benton, CAPTRUST's managing director. "We are excited to welcome



yet another stellar team in Texas, now our second-largest employee presence in the country.â?•

Engrave joined CAPTRUST in late 2023, and, consistent with other transactions, Engrave will take on the CAPTRUST brand.

Waller Helms Advisors served as Engraveâ??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 more than 1,500 employees across 90 locations nationwide, CAPTRUST oversees more than \$817 billion in assets, including just over \$668 billion in nondiscretionary assets under advisement, and just over \$149 billion in discretionary managed account assets (as of September 30, 2023).

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