CAPTRUST Adds Georgia-Based Stewardship Financial Advisors

Raleigh, N.C. – June 9, 2021 – CAPTRUST Financial Advisors (CAPTRUST) today announced that Stewardship Financial Advisors (Stewardship) has joined the firm. The Atlanta-based firm adds $873 million in assets under management and nearly 1,000 clients.

Stewardship specializes in holistic planning encompassing five key areas: estate planning, asset and risk management, tax planning, retirement income planning, and investment services. The firm is led by Charles B. Pyke Jr., who founded the firm in 1997. The entire Stewardship team, including ten advisors and support staff, are joining CAPTRUST.

“I founded Stewardship with the mission of helping people to be good stewards of all that has been entrusted to them. We fulfill this mission by offering comprehensive financial planning,” said Pyke, now principal, financial advisor at CAPTRUST. “As we grew to meet the needs of our growing client base, we felt it was time to partner with a firm committed to this mission and with the depth of scale to fully meet the responsibilities to our clients. CAPTRUST’s culture, mission, and core values match ours, and their deep resources enhance our holistic planning offerings for our clients. Aligning our team and our clients with CAPTRUST is what we needed to move to the next phase of our growth.”

In addition, CAPTRUST will also now have access to Stewardship’s sister estate planning law firm, Pyke & Associates, which will remain a separate entity.

“One of the things that attracted us to Stewardship is its deep expertise in estate planning,” said Rush Benton, CAPTRUST senior director, strategic growth. “As we continue to build out our holistic wealth management offering, this is an important piece of the puzzle.”

Stewardship has two offices in Georgia—in Peachtree City and Stockbridge—in addition to CAPTRUST's existing locations in Atlanta and Alpharetta. Stewardship is the 49th organization to join the firm since 2006 and will transition to the CAPTRUST name and brand. Stewardship was advised by Park Sutton Advisors, LLC and had legal representation from Riezman Berger.

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 nearly 900 employees across more than 50 locations nationwide, CAPTRUST oversees more than $60 billion in assets under management and more than $600 billion in assets under advisement (as of June 1, 2021).

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