



CAPTRUST Adds Fort Worth’s Omega Wealth Partners

Raleigh, NC—June 1, 2023—CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of Omega Wealth Partners (Omega), based in Fort Worth, Texas. The wealth management firm provides holistic financial planning, retirement planning, and estate planning services, and it oversees more than \$710 million in assets for high-net-worth individuals and families.

CAPTRUST’s second deal in Texas this year, Omega is co-owned by [Tom Hardgrove](#), [John Dickens](#), and Tammy Bryant. The three will join CAPTRUST along with six additional colleagues.

“The wide array of resources we gain by joining CAPTRUST will give us an edge as we continue to provide a top-notch client experience,” said Hardgrove. “We knew right away that becoming a part of CAPTRUST was a good decision—at our core, we both prioritize the relationship with each client.”

“With a long history as a family-owned business in Fort Worth, CAPTRUST’s collaborative nature and colleagues’ genuine support for each other’s successes was one of the many reasons we knew they were the right fit,” said Dickens. “We look forward to enhancing the tailored service we currently



deliver to our clients by utilizing CAPTRUST's extensive marketing, investment, and research options.”

CAPTRUST has been expanding throughout Texas for over a decade, including recent additions Monroe Vos, Covenant, and South Texas Money Management. CAPTRUST now has locations in seven cities within Texas (Austin, Boerne, Corpus Christi, Dallas, Fort Worth, Houston, and San Antonio), and its employee presence in Texas totals more than 120.

“We are excited to enter a new market in Fort Worth with Omega. As former professional athletes, Tom and John understand the collaborative nature that is crucial to CAPTRUST's success. We are looking forward to bringing Omega's expertise to the firm,” said Rush Benton, CAPTRUST's senior director of strategic growth.

This deal is CAPTRUST's fourth of 2023 and the 67th since 2006. Consistent with other transactions, Omega will take on the CAPTRUST brand. Park Sutton Advisors, a Waller Helms Company, served as Omega's financial advisor in the transaction.

About CAPTRUST

CAPTRUST was founded in 1997 and registered as 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).