



CAPTRUST Expands Presence in Pacific Northwest With Trutina Financial

Raleigh, NC—December 8, 2023—CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of [Trutina Financial](#) (Trutina). Trutina is based in Bellevue, Washington, and oversees more than \$1.1 billion in assets across institutional and individual clients.

Like CAPTRUST, Trutina serves clients across three lines of business: wealth management, retirement plan services, and OCIO for endowments and foundations. Trutina translates to balance in Latin, and the firm works to provide balance to clients with its holistic service model—from investment strategy to financial planning, plus giving back to the local community.

Managing Partner and Chief Compliance Officer Geoffrey Schock and Senior Partner and Chief Strategy Officer Matt Myers lead the firm and have joined CAPTRUST, along with 13 additional colleagues.

“The more we learned, the more we realized the folks at CAPTRUST are in this business for the right reasons,” said Myers. “They will help us grow up as a firm and be able to keep serving our clients with more sophisticated services. Plus, we’re able to put equity into the hands of our people.”

“CAPTRUST’s commitment to community through its foundation was a confirmation of the feelings we already had,” said Schock. “Out of the firms we talked with, CAPTRUST was the one that most aligned with us on leaving our communities better than we found them.”

“The Pacific Northwest is a region we have wanted to expand in for a long time,” said [Rush Benton](#), CAPTRUST’s senior director of strategic growth. “Adding the folks at Trutina is the perfect way to initiate our presence in this market.”

Consistent with other transactions, Trutina will take on the CAPTRUST brand. Park Sutton Advisors, a Waller Helms Company, served as Trutina’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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