



CAPTRUST Announces Two Additional Deals That Closed in 2021: Crescent Capital Consulting & New Market Wealth Management

Raleigh, N.C.—January 19, 2022—CAPTRUST Financial Advisors (CAPTRUST) today announced two additional deals that were completed in 2021: Crescent Capital Consulting (Crescent) and New Market Wealth Management (New Market). In total, CAPTRUST added 11 firms in 2021, a new record for the firm.

Based in New Orleans, Crescent provides investment management services to institutions as well as high-net-worth and ultra-high-net-worth families. Crescent also has several endowment and foundation clients and offers institutional investment management consulting. Crescent is led by President [Andrew Wisdom](#), Executive Vice President [Bryan Fitzpatrick](#), and Executive Vice President of Operations [Luis Zervigon](#). They are joining CAPTRUST, along with 16 other colleagues and add \$1.5 billion in assets.

“We are proud of the firm we built over the past 12 years. As we have grown, our clients’ needs have grown, so we needed access to a broader, deeper, and independent platform to meet those needs,” said Wisdom, who joins CAPTRUST as a principal. “CAPTRUST provides us with a full spectrum platform, freedom from advisory conflicts, and matches our values and culture perfectly. We are



delighted to become part of CAPTRUST as professionals and know this transition is a win for our clients.”

Crescent also brings to CAPTRUST estate planning, tax compliance, and advisory services, as well as family governance and trust management. Since late 2020, CAPTRUST has added several firms to build out these offerings, including:

- RINET | Family office services
- Covenant Multifamily Office | Family office services and tax preparation
- Stewardship Financial Advisors | Estate planning and tax planning
- MRA Associates | Income and estate tax compliance and consulting services

New Market is a wealth management firm led by Principal [Daryl Deke](#) and brings to CAPTRUST its first brick-and-mortar location in Nashville. Deke, who recently relocated his firm from Irvine, California, to build out this new location for CAPTRUST, has decades of deep expertise in financial services at several national firms. He adds to CAPTRUST \$275 million in assets.

“Our firm and my professional experience have a combined 35-year history of serving clients in the southeast, including working with investors in Nashville. We have developed businesses in many markets around the country and the growth that is occurring in Nashville makes for a unique opportunity,” said Deke. “Our capabilities, combined with CAPTRUST’s robust resources and scale, make for an unbeatable team in the market.”

“While we have long had clients in Nashville and New Orleans, adding physical locations in these top strategic markets has been priority for CAPTRUST,” said [Rush Benton](#), senior director, strategic growth for CAPTRUST. “Crescent is a natural fit for CAPTRUST with existing clients in all three of our lines of business. Daryl’s extensive industry relationships and understanding of the industries that are key to the Nashville market will fuel his rapid growth.”

New Market is the 55th firm and Crescent is the 56th firm to join CAPTRUST since 2006. Consistent with previous firms that have joined CAPTRUST, both firms will take on the CAPTRUST brand moving forward. Crescent was represented by law firm Jones Walker.

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).

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