



CAPTRUST Bolsters Northern California Presence with Addition of Genovese Burford & Brothers

RALEIGH, N.C. – February 3, 2021 – CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of Sacramento, California-based Genovese Burford & Brothers Wealth & Retirement Plan Management, LLC (GBB).

GBB was founded in 1987 by Mike Genovese and Lon Burford to provide financial advice to individuals and retirement plans. The firm currently has \$3.13 billion in assets under advisement for nearly 1,500 clients. In addition to Genovese and Burford, GBB is led by Chief Executive Officer Alex Brown and Partner Kelly Brothers.

“I co-founded GBB more than 30 years ago on the premise that a collaborative team continuously building their knowledge could better serve clients’ interests than any one individual,” said Genovese. “Joining CAPTRUST is the continuation of this vision as we plug into a network of more than 800 new colleagues and a wealth of centralized resources. The scale that CAPTRUST has achieved, which allows us to leverage everything from technology and trading to compliance and marketing, is truly unmatched in the industry.”

“GBB’s hybrid model of providing wealth and institutional services is only a part of what makes them a great fit for CAPTRUST,” said Rush Benton, CAPTRUST senior director, strategic growth. “The firm shares our growth mindset, and we are confident the GBB team will flourish as a part of CAPTRUST.”



GBB brings to CAPTRUST 36 new colleagues, including 17 financial advisors. GBB is the forty-sixth firm that has joined CAPTRUST since 2006 and will take on the CAPTRUST brand moving forward. CAPTRUST also has an additional Northern California location in San Ramon.

About CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment advisor with a mission to enrich the lives of its clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation. The firm provides investment advisory, investment management, and planning services to thousands of private clients and institutional investors such as retirement plan fiduciaries, endowments, foundations, and religious entities. With more than 800 employees across 49 locations nationwide, CAPTRUST oversees more than \$50 billion in assets under management and \$409 billion in assets under advisement (as of September 30, 2020).

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