



CAPTRUST Continues Rapid Growth with Addition of \$1.4 Billion Long Island-Based FCE Group

RALEIGH, NC (10.15.2018) – CAPTRUST Financial Advisors (CAPTRUST), one of the nation’s leading independent Registered Investment Advisors, today announced that the \$1.4 billion wealth advisory firm, FCE Group, has joined its team. This marks CAPTRUST’s third merger of 2018 and brings a total of 23 new colleagues to the CAPTRUST organization, which now has more than 480 employees across 38 offices in 20 states.

FCE Group was founded in 1981 and is led by Chairman David H. Schwartz, and CEO Fred Sloan. The firm has a 37-year history of providing clients with independent, holistic wealth management services. “When we considered potential strategic partners as we planned for the long term, CAPTRUST is the only firm that made us feel like we would become part of both a business and a family,” said FCE Group CEO Fred Sloan and FCE Group Chairman David H. Schwartz. “Our primary concern has always been, and remains, the well-being of our clients. The combination of CAPTRUST’s resources, their independence, their stellar track record for growth, and most importantly, their client-focused culture made it clear to us that the decision to join forces with CAPTRUST is the right one for our clients and colleagues. While the decision to merge was not an easy one, we felt it was the optimal path to ensure our continued ability to serve our clients for the foreseeable future with the same personalized, client-driven, wealth management and financial planning services that have marked our decades-long history.”

CAPTRUST fully integrates acquired firms, and this model has a proven record of success in accelerating advisory practice growth and enhancing the value of the overall client experience. This model also creates the opportunity for acquired firms to contribute to the larger organization, and in the case of FCE Group, their financial planning process and deep expertise in alternative investing



strategies will be of benefit to all CAPTRUST clients.

“When evaluating if a firm is the right fit to join CAPTRUST, our chief focus has always been culture,” said Fielding Miller, CAPTRUST CEO. “Fred, David and their team at FCE bring a set of skills and values to CAPTRUST that align perfectly with our business objectives and client service philosophy; we look forward to beginning our relationship with them and working together to ensure the success of our clients.”

About CAPTRUST Financial Advisors

CAPTRUST Financial Advisors is an independent investment research and fee-based advisory firm specializing in providing retirement plan and investment advisory services to retirement plan fiduciaries, endowments and foundations, and executives and high-net-worth individuals. Headquartered in Raleigh, North Carolina, the firm represents more than \$278 billion in client assets from its offices located across the U.S.

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