



CAPTRUST Continues to Grow Northern California Wealth Management Offering with Addition of Pacific Investment Consultants

Raleigh, N.C. • April 1, 2021 CAPTRUST Financial Advisors (CAPTRUST) today announced that Pacific Investment Consultants (PIC) has joined the growing firm. PIC brings more than \$700 million in assets under management (AUM) to CAPTRUST and comes on the heels of the firm adding another Northern California-based team, Genovese Burford & Brothers Wealth & Retirement Plan Management, LLC (GBB).

Based in Folsom, California, PIC provides wealth management and retirement planning to roughly 600 clients. The firm is led by financial advisors Christeen Reeg, Scott Gordon, Bill Altavilla, Debbie Hightower, and Ryan Jantzen, who will join CAPTRUST as principals. The entire PIC team, including four additional team members, will join CAPTRUST.

“At Pacific Investment Consultants, we have worked hard to provide the opportunities for our clients through detailed research and innovative planning,” said Reeg. “Joining CAPTRUST will allow us to leverage their vast resources to strengthen our client outcomes and grow our team.”

“We look for firms who prioritize serving their clients as a fiduciary and PIC was no exception,” said Rush Benton, CAPTRUST senior director, strategic growth. “We are excited for PIC to join our team and believe they will fit flawlessly into our business, with the new team members adding great value to the CAPTRUST organization.”

With the addition of PIC, CAPTRUST continues to expand its foothold in California. Since 2006, a total of 48 firms have joined CAPTRUST. As with all firms that join CAPTRUST, Pacific Investment Consultants will transition to the CAPTRUST name and brand.



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 800 employees across more than 50 locations nationwide, CAPTRUST oversees more than \$60 billion in assets under management and \$600 billion in assets under advisement (as of February 15, 2021).

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