



CAPTRUST Exceeds \$1 Trillion of Total Client Assets

Raleigh, N.C. – July 30, 2024 – CAPTRUST Financial Advisors (CAPTRUST) today announced a major milestone, eclipsing \$1 trillion of total client assets as of June 30, 2024. Founded in Raleigh, North Carolina, CAPTRUST has grown to a national firm with clients in all 50 states.

“This milestone is a surreal achievement. When we launched in 1997, we had 12 colleagues working out of a single location in Raleigh. Since then, we have grown to 1,600 colleagues with over 90 locations across the U.S. While we had lofty ambitions, we could have never imagined our current standing,” said Fielding Miller, co-founder, CEO, and chairman of the board.

“As we look forward, our opportunities are accelerating,” Miller said. “The RIA industry is in a great period of consolidation, and we are well positioned to continue our trajectory in the years to come, due to the tremendous work of our colleagues and the support of our vendor partners and our investment partners, GTCR and Carlyle.”

About CAPTRUST



CAPTRUST was founded in 1997 as an independent registered investment advisor. 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. The CAPTRUST Community Foundation was organized in 2007 to provide CAPTRUST employees with opportunities to participate as a group in community outreach efforts. The foundation is a registered 501(c)(3) charity and is eligible to receive tax-deductible contributions. If you would like to donate or learn more about the CAPTRUST Community Foundation, please call 855.649.0943.

Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors