



CAPTRUST Expands North Carolina Footprint with Merger of Morton Wealth Management

RALEIGH, NC (9.10.2018) – CAPTRUST Financial Advisors (CAPTRUST), one of the nation’s leading independent wealth management and retirement plan advisory firms, today announced that fee-based financial consulting firm Morton Wealth Management, headquartered in Greensboro, North Carolina, has joined its growing team.

Led by founding advisor Steve Morton, CPA and CFP®®, Morton Wealth Management specializes in investment management and financial planning and offers clients a holistic approach to retirement. The team manages more than \$400 million in assets for high-net-worth individuals and families and brings more than 30 years of experience to CAPTRUST.

“Joining CAPTRUST was a natural transition for Morton Wealth Management as we look to expand and bolster our client offering and services,” said Steve Morton, founder and principal advisor of Morton Wealth Management. “CAPTRUST is an industry leader, and this partnership enables us to leverage their people and technology to put our clients’ needs first while growing our footprint. We are excited to move forward as a part of the CAPTRUST family.”

CAPTRUST welcomes seven new colleagues to its team, including three advisors, from Morton Wealth Management’s office in Greensboro.

Ranked the number one Registered Investment Advisor (RIA) in the country for the past three years by *Financial Advisor Magazine* and the top plan advisor by *Institutional Investor* in 2018, CAPTRUST provides a compelling alternative for independent RIAs who are trying to solve for growth, succession, or scale. Their partnership approach provides firms with leading technology, research, and



investment resources that have been proven to add substantial value to the client experience.

The merger of Morton Wealth Management marks CAPTRUST's 30th deal since 2006. The firm now has 159 advisors across 37 locations and advises on more than \$278 billion in client assets.

"We're always seeking firms who are willing to buy into our culture and, most of all, our people," said CAPTRUST CEO J. Fielding Miller. "Steve and his team are an incredible cultural fit, and they bring decades of valuable expertise to our wealth management division. We're honored to welcome Morton to join in CAPTRUST's mission."

About CAPTRUST

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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