



CAPTRUST Expands Midwest Presence With Addition of Frontier

Raleigh, N.C.â??July 26, 2022â??CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of Frontier Wealth Management (Frontier). Headquartered in Kansas City, Missouri, Frontier brings an extensive Midwest footprint, with additional locations in St. Louis, Missouri; Wichita, Kansas; Omaha, Nebraska; and Denver, Colorado.

Frontier offers a full range of financial planning, investment, insurance, and other wealth management solutions to individuals, families, executives, and professionals, as well as advisory services to corporate retirement plans.

Frontier is led by Partner and CEO [Nick Blasi](#) and adds more than \$4 billion in new client assets, five locations, and 46 new colleagues to CAPTRUST.

â??I have known CAPTRUST for years. As I started creating Frontierâ??s strategic plan for the next three years, I realized that we would need to invest significant time, energy, and capital to build out areas of our business, like cybersecurity, marketing, and investment services, to continue to grow. These are already areas where CAPTRUST has achieved significant scale,â?• said Blasi. â??Joining CAPTRUST will benefit not only our clients, but the Frontier team as well. From the opportunity to become shareholders to new career paths, CAPTRUST puts our team on a great trajectory for growth.â?•

â??Nick and his team have built an impressive business with many operational similarities to ours, which, along with strong cultural alignment, creates an excellent fit for CAPTRUST,â?• said [Rush Benton](#), CAPTRUSTâ??s senior director of strategic growth. â??Frontier understands and shares our method of one unified practice, and we are excited to see how they grow and thrive as we join



forces.â?•

â??We know that the resources CAPTRUST offers are a value add for our business, including its people. Once our colleagues understood the full capabilities of the CAPTRUST team, the enthusiasm solidified our decision. The move to CAPTRUST is immediately a step in the right direction for us,â?• continued Blasi.

This deal marks the first for CAPTRUST to close in 2022 and the 57th firm overall to join since 2006. Consistent with previous firms, Frontier will transition to the CAPTRUST brand.

About CAPTRUST

CAPTRUST is an independent registered investment advisor founded in 1997 in Raleigh, North Carolina. 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 1,100 employees across 70 locations nationwide, CAPTRUST oversees more than \$100 billion in assets under management and more than \$750 billion in assets under advisement (as of March 31, 2022).

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