



CAPTRUST Expands with Suncoast Prosperity Advisors

Raleigh, N.C. – February 25, 2026 – [CAPTRUST Financial Advisors](#) (CAPTRUST) today announced that [Suncoast Prosperity Advisors](#), a wealth management practice and division of Suncoast Equity Management, based in Tampa, Florida, has joined CAPTRUST.

Suncoast Prosperity Advisors provides comprehensive wealth management services to private wealth clients through tailored financial planning and deep investment expertise. The practice is led by President Jeff Strouse, supported by a team of eight professionals, including senior advisors Beth Neal and Terri Ritchie. The firm has approximately \$830 million in assets. With this addition, CAPTRUST expands its presence in Tampa with a second office and introduces new locations in Sanibel, Florida, and Highlands, North Carolina.

“Suncoast Prosperity Advisors was built with the belief that great advice should evolve as clients’ lives grow more complex,” said Jeff Strouse. “By joining CAPTRUST, we’re gaining expanded capabilities and resources that enhance what we can deliver for our clients, while staying true to the personal relationships and client-focused approach that define our practice.”

“What stood out about Suncoast was their team, how they work, how they serve clients, and how they’ve built trust over time,” said Eric Bailey, CAPTRUST principal and southeast regional leader. “Their team adds meaningful depth to our private wealth business, and we’re excited about the momentum we can build together as they join CAPTRUST.”

“CAPTRUST’s scale, resources, and client-first culture make them an exceptional fit for Suncoast Prosperity Advisors’ clients,” said Donald Jowdy, founder and chief investment officer of Suncoast Equity Management.

Suncoast Prosperity Advisors joined CAPTRUST in January 2026 from Suncoast Equity Management, which will continue operating independently as a boutique investment management company.



About CAPTRUST

CAPTRUST provides independent, client-first financial advice and investment management services to individuals, endowments, foundations, nonprofit organizations, retirement plan sponsors, and their employees. For individuals, the firm focuses on holistic financial planning and wealth management, plus concierge services for those with ultra-high net worth. For institutions, CAPTRUST also offers outsourced chief investment officer (OCIO) services, fiduciary support, plan design and provider analysis, fee benchmarking, and financial wellness programs.

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