



CAPTRUST Grows in Kansas City with Addition of Meritage Portfolio Management

Raleigh, N.C. – February 4, 2026 – [CAPTRUST Financial Advisors](#) (CAPTRUST) today announced that [Meritage Portfolio Management](#) (Meritage) in Kansas City has joined the firm.

Meritage provides wealth management services to high-net-worth individuals, as well as retirement plan and endowment and foundation investment management. Led by President and Co-Chief Investment Officer Mark Eveans and Principal Jim Klein, Meritage has \$2.4 billion in client assets and brings 17 new colleagues to CAPTRUST, including nine advisors.

“By joining CAPTRUST, we are positioning ourselves for long-term success,” said Mark Eveans. “This strategic step gives our team access to a broader network of resources and support that will help us create new opportunities for both our clients and colleagues.”

“Meritage has a unique perspective and proven expertise that complements our capabilities,” said Nick Blasi, principal and Midwest regional leader at CAPTRUST. “Kansas City has become a key growth market for CAPTRUST, and Meritage’s reputation for thoughtful, trusted client relationships adds tremendous value as we continue to expand. This addition strengthens our ability to serve clients locally while supporting our long-term national growth.”

In recent years, CAPTRUST has added several firms in Kansas City, including [Frontier Wealth Management](#) in 2022, and also Wichita. With the addition of the Meritage team, the firm now has 54 employees in the state and two locations in Kansas City.

Meritage joined CAPTRUST in December 2025. As with previous transactions, Meritage will adopt

the CAPTRUST brand. Houlihan Lokey served as Meritage's financial advisor in the transaction.

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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