CAPTRUST

CAPTRUST Grows with the Addition of Stillwater Capital Advisors

Raleigh, N.C. â?? May 14, 2026 â?? CAPTRUST Financial Advisors (CAPTRUST) today announced that Stillwater Capital Advisors (Stillwater) based in Devon, Pennsylvania, has joined the firm.

Stillwater provides investment management and wealth management services to individuals and small businesses, as well as endowments and foundations. The firm is led by co-founder, Doug Swope, supported by a team of five additional professionals and has $1.25 billion in assets. Stillwater expands CAPTRUSTâ??s presence in Pennsylvania, adding a fifth office in the state.

â??Joining CAPTRUST gives us access to a network of resources and technology which will free up more of our time to help our clients with their financial, family, and life goals. The firmâ??s *client-first* focus has been evident every step of the way and matches the Stillwater culture,â?• said Swope. â??Stillwater Capitalâ??s business has grown over the years in large part because we focus on doing whatâ??s best for our clients, and that will continue with CAPTRUST.â?•

â??What impressed us most about Stillwater was the caliber of their team and the intentional way they serve clients,â?• said Rick Shoff, managing director at CAPTRUST. â??They have built a strong reputation through discipline, integrity, and long-term thinking. Their addition strengthens our private wealth presence in Pennsylvania, and weâ??re excited to support their continued growth as part of CAPTRUST.â?•

As with previous transactions, Stillwater will adopt the CAPTRUST brand. FP Transitions served as Stillwaterâ??s advisor in the transaction.

â??While market conditions continue to evolve, the longâ??term outlook for M&A in our industry remains compelling,â?• said Mike Wunderli, CAPTRUSTâ??s managing director of M&A. â??Firms are increasingly seeking partners that can provide operational resources and strategic support around succession planning, growth, and rising regulatory complexityâ??and we believe thoughtful, valuesâ??driven combinations will continue to define the next phase of growth.â?•

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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