



CAPTRUST Grows Wealth Practice with Addition of Catawba Capital Management

RALEIGH, NC – July 23, 2018 – CAPTRUST Financial Advisors (CAPTRUST), one of the nation's leading independent wealth management and institutional investment advisory firms, today announced that Roanoke, Virginia-based investment advisory firm Catawba Capital Management has joined the growing CAPTRUST family. Catawba brings more than \$1 billion in client assets to CAPTRUST and will assume the company's brand as part of this merger.

Founded in 1992 and led by partners Terence Crowgey and R. Jay Irons, Catawba's 10-member team specializes in investment management for individuals, businesses, and institutions across 21 states. This partnership with CAPTRUST will allow Catawba to scale, expand, and strengthen its breadth of client services while further accelerating the firm's impressive growth.

"We are excited to join together with CAPTRUST, first and foremost because they understand our culture and deeply embedded commitment to our clients," said **Crowgey**. "As part of this new team, we're excited to take advantage of an extremely deep bench of investment, research, and planning expertise to help our clients grow their wealth and plan for their futures. This is an exciting time for Catawba."

CAPTRUST offers advisory teams looking for a long-term partner with a variety of resources that have a proven history of accelerating growth and adding substantial value to the client experience over time. CAPTRUST's tandem institutional business and wealth management services offer a decades-old foundation of stability to joining entities that is unparalleled in today's independent financial advisory industry.

“Every firm that has joined CAPTRUST over the past 10-plus years has brought skills, expertise, and people that are additive to our culture and added tremendous value to our collective team and its mission,” said **CAPTRUST CEO, J. Fielding Miller**. “Catawba is no exception, and they will be a great addition to the CAPTRUST family.”

This merger marks the 29th deal completed since 2006 for CAPTRUST, and the firm’s fourth Virginia office. CAPTRUST now has 153 advisors across 36 locations and advises on more than \$278 billion in client assets.

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.

Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors
