



CAPTRUST Merges with Knox Capital Group

February 8, 2018 (RALEIGH, NC) – CAPTRUST Financial Advisors (CAPTRUST), one of the nation’s leading independent wealth management and institutional advisory firms, today announced that Salt Lake City-based Knox Capital Group, one of Utah’s premier wealth management firms, has joined the CAPTRUST family, bringing with it more than \$300 million in client assets.

Led by partners **Brodie Barnes** and **Stanley Kimball**, Knox Capital Group was founded in 2003 and offers comprehensive wealth management services for high net worth individuals, business owners, companies, and families. The Knox team also performs sophisticated planning and insurance funding for high-net-worth families and business owners. One highlight is the team’s focus on business succession and exit planning to help business owners maximize the value of their companies and optimize their estates while planning for future generations. Knox Capital Group is comprised of 12 employees, including six financial advisors, all of whom will remain with the firm under the newly adopted CAPTRUST brand.

“Knox Capital Group was founded on the principals of strength, security, innovation, courage, hard work and integrity,” said **Barnes**. “CAPTRUST shares these same values and will provide a great home for us. And our team of experienced advisors, including five CPAs, focused on ultra-affluent clients and exit planning is a perfect fit to round out CAPTRUST’s wealth management offering.”

CAPTRUST offers advisory teams looking for a long-term partner numerous resources that have been proven over time to accelerate growth and add substantial value for clients. CAPTRUST’s institutional business, coupled with wealth management services, offers a decades-old bedrock of stability to joining entities that is unparalleled in today’s independent financial advisory industry.



“When we look for firms to join our team, a mutual cultural fit is the most important identifier of a strong, long-term partnership,” said **CAPTRUST CEO J. Fielding Miller**. “Brodie, Stan, and the Knox team are an incredible group that exemplifies client-first service, and we’re honored that they have chosen to join CAPTRUST.”

This merger marks the 28th deal completed since 2006 for CAPTRUST, and the firm’s first Utah office. CAPTRUST now has 151 advisors across 36 locations and advises on more than \$248 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, executives, and high-net-worth individuals. Headquartered in Raleigh, North Carolina, the firm represents more than \$248 billion in client assets with offices in Alabama, California, Connecticut, Florida, Georgia, Iowa, Michigan, Minnesota, New York, North Carolina, Ohio, Pennsylvania, Texas, Utah, and Virginia.

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