



CAPTRUST Named to Barron's 2022 List

Barron's released its 2022 rankings for the Top 100 Institutional Consulting Teams, including 20 CAPTRUST teams from across the country. The goal of the award is to shine a spotlight on the nation's best financial advisors, with an eye towards raising standards in the industry. Criteria for this recognition includes assets under management, revenue, and quality of practice. The firm represents 20 percent of the 100 spots for this year's list.

These CAPTRUST teams and their key advisors were ranked as follows:

- #2 – Team New York/Boston, led by [Michael Volo](#), [Jeffery Levy](#), and [Michael Sanders](#)
- #10 – Team Allentown, led by [Jim Edwards](#), [Wes Schantz](#), and [Jeff Loehwing](#)
- #12 – Team Schott, led by [Stephen Schott](#)
- #25 – Team Doylestown, led by [Chris Kulick](#), [Paul Schaffer](#), [Scott Wertheim](#), and [Sean Teesdale](#)
- #27 – Team Bailey, led by [Eric Bailey](#)
- #28 – Team Stanicek, led by [Jason Stanicek](#)
- #29 – Team Atlanta, led by [Philly Jones](#), [Evan Melcher](#), [Zack Sadler](#), and [Drew McCorkle](#)
- #33 – Team Dallas, led by [John Pickett](#) and [Travis Whitten](#)
- #34 – Team Strickland, led by [Jon Strickland](#)
- #37 – Team Esch, led by [Dan Esch](#)
- #39 – Team Strodel, led by [Jim Strodel](#)
- #41 – Team Schmitt, led by [Barry Schmitt](#)
- #50 – Team Birmingham, led by [Paul Owen](#), [Phil Anderson](#), and [Beau Williams](#)
- #55 – Team South Michigan, led by [Dori Drayton](#) and [Susan Shoemaker](#)
- #56 – Team Wilt, led by [Steve Wilt](#)
- #60 – Team Des Moines, led by [Jean Duffy](#) and [Andrew Shimp](#)
- #69 – Team Eskamani, led by [Shaun Eskamani](#)

#70 – Team DiGiacomo, led by [Dan DiGiacomo](#)

#81 – Team Pratico, led by [Mike Pratico](#)

#84 – Team Medlin, led by [Mark Medlin](#)

To view the full list from *Barron's*, click [here](#).

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