



CAPTRUST on Barron's Top 100 for 2025

Twenty-three CAPTRUST advisor teams made Barron's 2025 Top 100 Institutional Consulting Teams list. Since 2004, the financial news organization has ranked the best institutional advisors in the U.S., based on revenue, assets, and quality of practice.

These CAPTRUST teams and their key advisors are:

- #2 – Team New York | Boston, led by [Earle Allen](#), [Michael Sanders](#), [Emily Wrightson](#), and [Michael Volo](#)
- #7 – Team Chicago, led by [Tim Egan](#), [Dan George](#), and [Dan Simon](#)
- #9 – Team Allentown, led by [Jim Edwards](#), [Wes Schantz](#), and [Jeff Loehwing](#)
- #10 – Team Warren, led by [Michael Sasso](#), [Attila Toth](#), and [Richard Torbinski](#)
- #12 – Team Southfield & Grand Rapids, led by [Dori Drayton](#) and [Susan Shoemaker](#)
- #14 – Team Stanicek, led by [Jason Stanicek](#)
- #15 – Team Schmitt, led by [Barry Schmitt](#)
- #16– Team Dallas, led by [John Pickett](#) and [Travis Whitten](#)
- #20 – Team Doylestown, led by [Chris Kulick](#), [Paul Schaffer](#), [Scott Wertheim](#), and [Sean Teesdale](#)
- #21 – Team Denver, led by [Sarah Falgiatano](#), [Drew McCorkle](#), [Paul Schreder](#), and [Kevin Yoshida](#)
- #29 – Team Esch, led by [Dan Esch](#)
- #31 – Team Schott, led by [Stephen Schott](#)
- #35 – Team Strickland, led by [Jon Strickland](#)
- #39 – Team Eskamani, led by [Shaun Eskamani](#)
- #40 – Team Bailey, led by [Eric Bailey](#)
- #45 – Team Strodel, led by [Jim Strodel](#)
- #48 – Team Des Moines, led by [Jean Duffy](#) and [Andrew Shimp](#)
- #53 – Team Birmingham, led by [Paul Owen](#) and [Beau Williams](#)
- #56 – Team DiGiacomo, led by [Dan DiGiacomo](#)



- #65 – Team Wilt led by [Steve Wilt](#)
- #91 – Team Duex, led by [Devyn Duex](#)
- #92 – Team Pratico, led by [Mike Pratico](#)
- #93 – Team Atlanta, led by [Philly Jones](#), [Evan Melcher](#), and [Zack Sadler](#)

View the full Barron's list is [here](#).

Disclosure: CAPTRUST teams named on the "Barron's 2025 Top 100 Institutional Consulting Teams" ranking are based on a proprietary formula including 1) assets, 2) revenue, and 3) quality of practice for the year ending December 31, 2024. CAPTRUST nor its advisors paid a fee to Barron's to obtain or use the ranking. For more information on the methodology, please see go [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