



23 CAPTRUST Teams on Barron's 2026 Top 100

Twenty-three CAPTRUST advisor teams were named to Barron's 2026 Top 100 Institutional Consulting Teams list. Since 2004, Barron's has recognized top institutional advisors across the U.S. based on assets, revenue, and overall practice quality.

The following CAPTRUST teams and their key advisors were ranked:

- #2 Team New York | Boston, led by [Michael Volo](#) and [Michael Sanders](#)
- #7 Team Chicago, led by [Tim Egan](#), [Dan George](#), and [Dan Simon](#)
- #8 Team Warren, led by [Michael Sasso](#), [Attila Toth](#), and [Richard Torbinski](#)
- #9 Team Strodel, led by [Jim Strodel](#)
- #11 Team Allentown, led by [Jim Edwards](#), [Wes Schantz](#), and [Jeff Loehwing](#)
- #14 Team Dallas, led by [John Pickett](#) and [Travis Whitten](#)
- #18 Team Minneapolis, led by [Dan Esch](#) and [Evan Holmes](#)
- #19 Team Stanicek, led by [Jason Stanicek](#)
- #21 Team Southfield & Grand Rapids, led by [Dori Drayton](#) and [Susan Shoemaker](#)
- #22 Team Schmitt, led by [Barry Schmitt](#)
- #25 Team Wayne, led by [Chris Kulick](#), [Paul Schaffer](#), and [Scott Wertheim](#),
- #32 Team Denver, led by [Sarah Falgiatano](#), [Drew McCorkle](#), [Paul Schreder](#), and [Kevin Yoshida](#)
- #37 Team Schott, led by [Stephen Schott](#)
- #40 Team Eskamani, led by [Shaun Eskamani](#)
- #45 Team DiGiacomo, led by [Dan DiGiacomo](#)
- #54 Team Wilt, led by [Steve Wilt](#)
- #55 Team Bailey, led by [Eric Bailey](#)
- #57 Team Des Moines, led by [Jean Duffy](#) and [Andrew Shimp](#)
- #67 Team Atlanta, led by [Philly Jones](#), [Evan Melcher](#), and [Zack Sadler](#)
- #78 Team Birmingham, led by [Paul Owen](#) and [Beau Williams](#)
- #87 Team Pratico, led by [Mike Pratico](#)



- #90 Team Duex, led by [Devyn Duex](#)
- #94 Team Ball, led by [Beryl Ball](#)

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

Disclosure: CAPTRUST teams named on the Barron's 2026 Top 100 Institutional Consulting Teams ranking were evaluated using a proprietary formula including 1) assets, 2) revenue, and 3) quality of practice for the year ending December 31, 2025. Neither CAPTRUST nor its advisors paid a fee to Barron's to obtain or use the ranking. For more information on the methodology, please click [here](#).

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