



CAPTRUST



CAPTRUST Ranked Among Nation's Top Independent Advisory Firms on Barron's 2026 Top RIA List

Barron's annual list evaluates independent advisory firms using both quantitative and qualitative measures, including assets under management, business growth and technology investment. Mega firms represent nearly half of the total assets of the firms on the list.

CAPTRUST's ranking on the Barron's 2026 Top RIA Firms list was based on qualitative and quantitative data, including assets managed, technology spending, and other business metrics as of June 30, 2026. Neither CAPTRUST nor its advisors paid a fee to Barron's to obtain the ranking, but did pay for use of the award logo and advertises in the publication. The [full methodology](#) can be found 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.

Â© 2026 CAPTRUST Financial Advisors