



## CAPTRUST Welcomes Alpha Cubed Investments

**Raleigh, N.C. – February 11, 2026 –** [CAPTRUST Financial Advisors](#) (CAPTRUST) today announced [Alpha Cubed Investments](#) (ACI), based in Southern California, has joined the firm.

Founded in 2011, ACI specializes in comprehensive wealth management and financial planning for individuals and families. ACI is led by CEO and Chief Technical Analyst Todd Walsh and President Tony Jabczenski, supported by a team of 28 professionals, including 16 total advisors and oversees approximately \$3.8 billion in assets.

“From our earliest conversations, it was clear that Alpha Cubed Investments shares our commitment to putting clients at the center of every decision,” said Mike Wunderli, managing director and head of mergers and acquisitions at CAPTRUST. “ACI brings a differentiated, organic growth strategy built around highly effective advisory teams. That model strengthens efficiency, scalability, and the overall client experience.”

“Joining CAPTRUST marks an exciting next chapter for ACI,” said Todd Walsh. “For years, our team has been driven by a commitment to thoughtful guidance and meaningful client relationships. We are energized by the opportunity to evolve with a firm that shares our philosophy and to continue delivering the thoughtful, high-quality advice our clients rely on and expect.”

Expanding CAPTRUST’s presence in Southern California, ACI is headquartered in Orange County, California, with an additional office in Scottsdale, Arizona. ACI joined CAPTRUST in January 2026 and will adopt the CAPTRUST brand. Gorman Jones served as ACI’s advisor in the transaction.

### About CAPTRUST

CAPTRUST provides independent, client-first financial advice and investment management services to individuals, endowments, foundations, nonprofit organizations, retirement plan sponsors, and their

employees. For individuals, the firm focuses on holistic financial planning and wealth management, plus concierge services for those with ultra-high net worth. For institutions, CAPTRUST also offers outsourced chief investment officer (OCIO) services, fiduciary support, plan design and provider analysis, fee benchmarking, and financial wellness programs.

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