



CAPTRUST Welcomes Campbell Wealth Management & TruNorth Wealth Partners

Raleigh, N.C. • December 19, 2024 CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of [Campbell Wealth Management](#) (Campbell) in Alexandria, Virginia, and [TruNorth Wealth Partners](#) (TruNorth) in St. Paul, Minnesota.

Founded in 2003, Campbell is a holistic financial and retirement planning-focused firm dedicated to building, managing, and preserving the wealth of their clients through exceptional service. The team, led by CEO Kelly Campbell, creates CAPTRUST's first location in Alexandria, VA. A total of 33 new colleagues from Campbell are joining CAPTRUST, along with \$1.4 billion in assets.

"We believe that a financial plan is at the core of every client relationship. Joining CAPTRUST was a natural next step for our firm because it also believes in the importance of financial planning and is helping us to bring deeper resources to clients, including estate planning, more extensive tax planning, and family office services," said Kelly Campbell.

"Campbell is unapologetically a growth-minded organization, just like CAPTRUST. We are excited to see what the future has in store for it in a market like northern Virginia, where we already have a substantial number of clients," said Rick Shoff, managing director, CAPTRUST.

TruNorth, founded in 2005 under the leadership of CEO Peter Rekstad and Travis Gleason, offers a comprehensive range of financial services. The firm's expertise extends to estate planning and multigenerational wealth planning, family education, and retirement planning for executives and professionals. TruNorth also serves institutions, including community and religious entities. With the firm's addition, CAPTRUST welcomes 10 talented colleagues and more than \$570 million in assets.

"Over the years, I've had many ideas about additional services that would be really impactful for our clients' financial lives but were just not feasible, given the size of our firm," said Peter



Rekstad. “With CAPTRUST, we can provide family office services, access to tax planning and compliance, and more, all from trusted CAPTRUST colleagues who uphold our standards of service beyond expectation.”

TruNorth’s philosophy is “the more complex the client, the better,” which complements the approach of our existing teams in the Minneapolis region. From serving our [niche of Big Four executives](#) to building relationships with institutional clients, we expect big things from our newest employees,” continued Shoff.

Houlihan Lokey served as Campbell’s financial advisor in the transaction, while Advisor Growth Strategies served as TruNorth’s financial advisor.

About CAPTRUST CAPTRUST was founded in 1997 as an independent registered investment advisor. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance services for individuals and families. The firm also offers a comprehensive suite of services for ultra-high-net-worth individuals to simplify their financial lives, mitigate risk, and perpetuate their legacies. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis and fee benchmarking, and employee advice programs.

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