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CAPTRUST Welcomes Michael Wunderli as Head of M&A

Raleigh, N.C. – June 4, 2025 – CAPTRUST Financial Advisors (CAPTRUST) today announced the appointment of Mike Wunderli as head of mergers and acquisitions (M&A). Wunderli will lead the firm's strategic inorganic growth initiatives, using his broad view of the marketplace to identify firms that align with the CAPTRUST vision—those that are client-focused, growth-driven, and mission-aligned.

"The industry is at an inflection point," said CAPTRUST CEO Fielding Miller. "We wanted someone who was ready to face those challenges with energy and enthusiasm. Mike is ready. He fits CAPTRUST, and he fits our strategic ambitions for the future."

Wunderli joins CAPTRUST from ECHELON Partners, a boutique investment bank where he served as a managing director since 2016. At ECHELON, he oversaw M&A activities across the wealth and asset management industry.

Before working at ECHELON, Wunderli spent 12 years at Lehman Brothers and UBS as a senior vice president in the private wealth management division. Throughout his career, he has worked closely with entrepreneurs and business owners and has collaborated with top investment managers, private equity funds, family offices, trading desks, and various capital providers.

"I've been on the other side of the table for the last nine years, and I've seen how the industry's top acquirers have evolved. CAPTRUST's elite offering, coupled with its integration expertise and deep resources, distinguishes it among the nation's top financial advisory firms," said Wunderli. "In my view, a select group of elite firms will emerge as the clear leaders in the independent space, and CAPTRUST is uniquely positioned to elevate the industry to new levels of quality, integrity, and fiduciary stewardship."

Wunderli holds a Bachelor of Arts from Brigham Young University and a Master of Business Administration from The Wharton School at the University of Pennsylvania. A native of Salt Lake City, Utah, he currently resides in Redondo Beach, California.

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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