



CAPTRUST Welcomes Tampa-based CapTrust Advisors

CAPTRUST, one of the nation's leading independent wealth management and retirement plan advisory firms, today announced that the Tampa, FL-based investment advisor CapTrust Advisors, has joined the CAPTRUST family. The combined organization will now operate in 34 offices nationwide and advise on more than \$243 billion in client assets.

CapTrust Advisors brings nearly two decades of investment consulting expertise in the wealth management, institutional retirement, foundation and endowment, and religious services sectors and \$19 billion of client assets under advisement. CapTrust opened in Tampa in 1998 and, together with CAPTRUST, was part of a larger CapTrust organization headquartered in Charlotte, NC. After many years partnering through the CapTrust Association, the two companies today have merged under the CAPTRUST brand, resulting in 34 offices nationwide, 138 advisors, and clients in all 50 states. This merger adds two Florida offices for CAPTRUST.

"Since their inception, CapTrust Advisors has created an enviable business built upon long-term relationships with their clients and business partners," said **CAPTRUST CEO and co-founder J. Fielding Miller**. "Given our relationship with them over the last 19 years, we understand the firm and its culture intimately, and we are excited for them to tap into the resources of the larger organization. This merger reflects the perfect alignment of values and our shared commitment to clients and colleagues."

Headquartered in Raleigh, NC, CAPTRUST offers advisory teams looking for a long-term home and numerous resources that are proven to accelerate growth and add substantial value to both their businesses and their clients' experience. This announcement marks the sixth merger the firm has completed in 2017 and the 26th deal completed over the last decade. Firms that join CAPTRUST



realize an average of 18 percent annual revenue growth and a renewed ability to focus on their highest and best use, which is typically serving clients in a fiduciary capacity.

“There are certain characteristics we look for when determining if a firm and its people will be a good fit for us: a synergy of culture and values, a growth-oriented mindset, and a tireless dedication to taking care of clients,” said **CAPTRUST’s Miller**. “Needless to say, the CapTrust Advisors team embodies those qualities. We’re confident that this merger will be a catalyst for all of us to grow together and further our unified vision.”

Rick Shoff, Managing Director, Advisor Group at CAPTRUST concludes, “For well over a decade, we have been actively seeking out those special individuals and entities whose vision and priorities align with ours—and when we find each other, you know it’s just right. Given the two firms’ shared history, the sentiment is amplified that much more.”

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- *Barron’s*: [CAPTRUST Nabs \\$19B Firm](#)
- *Financial Advisor*: [CAPTRUST Buys CapTrust Advisors](#)
- *Financial Advisor IQ*: [CAPTRUST Buys \\$19B Advisor, Also Called CapTrust](#)
- *InvestmentNews*: [CAPTRUST acquires \\$19B RIA in its sixth deal this year](#)
- *NAPA Net*: [CAPTRUST, CapTrust Advisors Reconnect](#)
- *Pensions & Investments*: [CAPTRUST reunites with CapTrust Advisors](#)
- *PLANADVISER*: [Firms Carrying CAPTRUST Brand Reunite After 20 Years](#)
- *RIABiz*: [Fielding Miller’s roll-up run hits wall as \\$220B CAPTRUST reunites with \\$20B CapTrust—effectively cleaning out the last plump M&A target](#)
- *The Wall Street Journal* (subscription required): [Captrust to Acquire Smaller Investment Advisory Rival](#)
- *ThinkAdvisor*: [CAPTRUST and CapTrust Reunite](#)
- *Wealth Management*: [Two RIAs Reunite, Creating a \\$243 Billion Firm](#)

About CAPTRUST

CAPTRUST Financial Advisors is an independent investment research and fee-based advisory firm specializing in providing retirement plan and investment advisory services to retirement plan fiduciaries, executives, and high-net-worth individuals. Headquartered in Raleigh, North Carolina, the firm represents more than \$243 billion in client assets with offices in Alabama, California, Connecticut, Florida, Georgia, Iowa, Michigan, Minnesota, New York, North Carolina, Ohio, Pennsylvania, and Texas.



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