



CAPTRUST Grows in Upstate New York with Cobblestone Capital Advisors

Raleigh, N.C. • October 15, 2025 CAPTRUST Financial Advisors (CAPTRUST) today announced that [Cobblestone Capital Advisors](#) (Cobblestone) in Rochester, NY has joined CAPTRUST.

Cobblestone provides investment management and wealth management services, as well as private investments and family office services. Led by an Executive Committee comprised of CEO John DiPasquale, Chief Investment Officer Jason Garlock, and Managing Director of Business Development Chris Mooney, the firm has \$3.1 billion in wealth and institutional assets. They bring 42 new colleagues to CAPTRUST, including 15 advisors, and marks CAPTRUST's first location in Upstate New York.

"From our first conversations, it was clear that both firms shared a deep commitment to our clients, our colleagues, and our communities," said DiPasquale. "Joining CAPTRUST not only strengthens everything we've built for our clients but also expands what's possible for our future. We're excited to bring the same trusted service, now with even greater reach and resources."

"Cobblestone's commitment to a team-based approach aligns perfectly with our mission," said [Rick Shoff](#), managing director at CAPTRUST. "We're always looking for firms that not only deliver exceptional client service but also share our long-term vision and cultural DNA. This is a strategic fit that strengthens our northeastern presence and deepens our bench of talent."

CAPTRUST previously had two offices in New York, including [New York City](#) and [Lake Success](#), Long Island. With the addition of the Cobblestone team, the firm has 87 employees in the state.

Cobblestone joined CAPTRUST in September 2025. As with previous transactions, Cobblestone will adopt the CAPTRUST brand. Houlihan Lokey served as Cobblestone's financial advisor in the transaction and Harter Secrest & Emery served as legal counsel.



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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