



Seven CAPTRUST Advisor Teams Named among 2018 *Barron's* Top 50 Institutional Consultants

April 27, 2018 (RALEIGH, N.C.) – CAPTRUST Financial Advisors (CAPTRUST), one of the nation's leading independent wealth management and institutional investment advisory firms, is pleased to announce that seven of its advisor teams have been named among the 2018 *Barron's* Top 50 Institutional Consultants. This is the publication's fourth annual institutional consultant ranking, which recognizes the nation's top teams specializing in investment consulting for defined contribution and defined benefit plans, and endowments and foundations.

The list is comprised of both independent and wirehouse advisory teams who are exemplary in the industry. Those named were evaluated on a range of criteria, including institutional investment assets overseen by the team, revenue generated by those assets, number of clients served by the team, and the number of team members. Advanced professional designations and professional accomplishments by the team were also taken into consideration.

The CAPTRUST teams, their lead advisors, and assets under advisement were ranked as follows:

- #5 – **Team Schott**, led by [Stephen Schott](#), Hollywood, FL (\$11.8 billion)
- #6 – **Team Esch**, led by [Dan Esch](#), Minneapolis, MN (\$18.9 billion)
- #12 – **Team Strickland**, led by [Jon Strickland](#), Raleigh, NC (\$15.8 billion)
- #13 – **Team Stanicek**, led by [Jason Stanicek](#), Raleigh, NC (\$17.3 billion)
- #28 – **Team Wilt**, led by [Steve Wilt](#), Akron, OH (\$8.1 billion)
- #34 – **Team Edwards/Schantz**, led by [Jim Edwards](#) and [Wes Schantz](#), Bethlehem, PA (\$5.6 billion)
- #35 – **Team Davis**, led by [Mark A. Davis](#), Westlake Village, CA (\$6.4 billion)

“The key to running a successful business is to surround yourself with the smartest and most talented people—and these talented teams are just the tip of the CAPTRUST iceberg,” said **CAPTRUST CEO Fielding Miller**. “This recognition is a testament to their ongoing commitment to building successful practices by putting their client needs above all else. I am extremely proud and honored to work alongside these excellent advisors.”

About CAPTRUST

CAPTRUST Financial Advisors is an independent investment research and fee-based advisory firm specializing in providing investment advisory services to retirement plan fiduciaries, endowments and foundations, executives, and high-net-worth individuals. Headquartered in Raleigh, North Carolina, the firm represents more than \$248 billion in client assets with 35 offices located across the U.S.

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.