



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.

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