



## South Texas Money Management Announces Plans to Join CAPTRUST

**SAN ANTONIO, TX – August 22, 2019** – South Texas Money Management, Ltd. (STMM), one of Texas' leading wealth management firms, announced today that it has entered into an agreement to join CAPTRUST Financial Advisors (CAPTRUST). CAPTRUST is a leading independent wealth management and institutional investment advisory firm with existing practices in Austin, Houston, and Dallas. STMM is headquartered in San Antonio with six wealth management offices across Texas and manages \$3.7 billion in client assets.

CAPTRUST is an independent, employee-owned firm that provides investment advisory services to high-net-worth individuals, executives, retirement plan fiduciaries, endowments, and foundations. Headquartered in Raleigh, North Carolina, the firm represents more than \$9.6 billion of wealth management assets and a significant business providing investment consulting services to institutional clients from its offices located across the U.S.

Jeanie Wyatt served as Chairman of STMM until her passing in April 2019, prior to which she and the STMM Management team, along with her family, chose CAPTRUST to fulfill her succession plan and continue her legacy.

Speaking on behalf of Wyatt's family and STMM, Jeanie's stepson Richey Wyatt stated, "When Jeanie, her son Trey, and I, along with the STMM management team mapped out the succession plan that eventually led us to CAPTRUST, we explicitly did so based on two guiding principles: What is best for our clients, and what is best for our employees. Under Jeanie's leadership, we unanimously agreed in a thorough process that CAPTRUST was our ideal strategic partner."

"As an employee-owned and community focused firm with a sizeable wealth management practice



and the highest ethical standards, CAPTRUST's culture matches ours," said Lance Lahourcade, managing director and STMM partner. "Partnering with CAPTRUST allows the STMM investment strategy to carry forward under our local leadership with no disruption to the services our clients are accustomed to, and we are confident that this partnership is a wonderful opportunity for STMM clients, employees, and the communities we serve."

In joining forces, STMM's clients will have access to CAPTRUST's deep bench of resources, services, and technology that will enhance the client experience. The transaction is expected to close in early September.

"From our first meeting with the team at South Texas Money Management, it was clear that they approach working with their clients with the same level of enthusiasm and care that has become a hallmark of CAPTRUST's services," said CAPTRUST founder and CEO J. Fielding Miller. "The team from South Texas Money Management perfectly embodies the spirit and ambition that we envision for the future of CAPTRUST and we look forward to building on this firm's impressive legacy in Texas for years to come."

STMM was advised by Park Sutton Advisors, LLC and had legal representation from Dykema.

### **About South Texas Money Management, Ltd.**

STMM was founded by Jeanie Wyatt in 2000 and provides financial advisory services across a variety of asset classes including equity, fixed income, balanced asset classes for individuals, trusts, retirement plans, charitable foundations and endowments, bank trust departments and other institutions. The firm has more than 60 employees their offices across Texas which are in San Antonio, Austin, Corpus Christi, Dallas, Houston and Brenham/College Station.

### **About CAPTRUST**

CAPTRUST Financial Advisors is an independent, employee-owned firm that provides investment advisory services to retirement plan fiduciaries, endowments, and foundations, and comprehensive wealth planning services to executives and high-net-worth individuals. Headquartered in Raleigh, North Carolina, the firm represents more than \$340 billion in client assets from its 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.

© 2025 CAPTRUST Financial Advisors