



## Two Individuals Named to *PLANADVISER* Top 100 List

Each September, *PLANADVISER* conducts its proprietary Retirement Plan Adviser Survey, which is later used to compile the Top 100 Retirement Plan Advisers list. According to *PLANADVISER*, “this list includes advisers who reach the top of their respective peer groups in terms of assets under advisement (AUA) or number of retirement plan clients, including defined contribution, defined benefit, and nonqualified plans.”

This year, CAPTRUST’s Texas-based Michael Maresh and Pennsylvania-based Scott Wertheim were named to the Top 100 list’s subcategory of “Individual Advisers With \$1 Billion or More in Retirement Plan Assets Under Advisement.”

To learn more about the methodology and to see the entire list, please [click here](#).

### **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 currently represents more than \$300 billion in client assets with 38 locations 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.

Â© 2026 CAPTRUST Financial Advisors