



Wednesday, April 24, 2019

CAPTRUST Announces Performance Results for 2018

CAPTRUST concluded 2018 with total assets under advisement of more than \$300 billion. The firm also saw 21.5 percent revenue growth and welcomed five new firms under the CAPTRUST brand.

RALEIGH, NC – April 25, 2019 – CAPTRUST Financial Advisors (CAPTRUST), one of the nation’s leading independent wealth management and retirement plan advisory firms, released its 2018 calendar year performance results. CAPTRUST concluded 2018 with \$65 billion in new client assets, bringing the firm’s total assets under advisement to more than \$300 billion. The firm also saw 21.5 percent revenue growth, maintained a 97 percent client retention rate, added 96 new employees, and welcomed five new firms under the CAPTRUST brand.

“In 2018 we reached another growth milestone, crossing the 500-employee mark for the first time in CAPTRUST’s history”, said **J. Fielding Miller, CEO, CAPTRUST**. “We were also honored by *InvestmentNews* as one of its 2019 Best Places to Work for Financial Advisors. This ranking and our continued growth are a testament to our talented team at CAPTRUST and our commitment to putting them at the forefront of all that we do.”

CAPTRUST, which is employee-owned, has recorded a 26.8 percent shareholder total return compounded since 2004. The company saw the addition of 37 new shareholders in 2018 for a total of 294 shareholders, or 57 percent of total employees.

As part of its commitment to give back to the communities it serves, CAPTRUST, along with its 501(c)(3) nonprofit organization, the CAPTRUST Community Foundation, donated more than \$724,000 to worthy causes for a record year of charitable giving in 2018. The organization is well on its way to achieving its goal of donating \$10 million by 2026.

“We are always looking for ways to not only attract the best talent, but also to highlight the work, unique ideas, and philanthropic efforts of the talent we currently have at CAPTRUST,” said **Rick Shoff, managing director, CAPTRUST**. “Our impressive team is the key to our continued success and this

growth would not be possible without their hard work, dedication, and commitment to the firm and the communities in which they live.”

CAPTRUST also announced the winners of its annual Brick Awards during the firm’s Advisor Kickoff meeting. The Brick Awards go to employees who exemplify CAPTRUST’s mission to enrich the lives of its clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation. The Brick Award categories and winners include:

- **MVP** – Jon Meyer, Chief Technology Officer, Business Operations Group
 - Awarded to the person who has provided the most significant overall contribution to the firm. Set apart from the crowd, the MVP best represents the spirit and goals of the company mission.
- **Client Service** – Pat Burger, Senior Client Management consultant, Business Operations Group
 - Awarded to the person who best represents CAPTRUST’s mission to enrich the lives of its clients with service that exceeds expectations. The winner demonstrates an extraordinary level of service, which helps to build relationships and ensure long-term client satisfaction and retention.
- **Community Service** – Trae Cole, Client Relationship Manager, Business Operations Group
 - Awarded to the person who best represents the CAPTRUST mission to enhance the lives of people in need within its communities. Recipients of the Community Service Brick demonstrate great passion for helping others and are most generous with the gifts of their time, talent, and resources.
- **Financial Advisor of the Year** – Barry Schmitt, Senior Vice President, Financial Advisor
 - Awarded to the person that best exemplifies the traits and characteristics of not only an advisor to his or her clients, but also as a mentor and supporter to his or her fellow advisors.
- **Step Up** – Pete Ruffel, Institutional Solutions Team Leader, Consulting Solutions Group
 - Awarded to the person who has taken on a major new challenge or accepted additional responsibilities and enhanced the firm by their actions.
- **Rainmaker** – Steve Schott, Principal and Director, Institutional Religious Retirement and Foundation Services
 - Given to the financial advisor (or advisory team) who brings the most new business to CAPTRUST in a given year. The award recognizes the advisor’s consulting skills and the necessity to continuously grow the CAPTRUST client base.
- **Innovation Award** – Market Value Input Tool
 - Awarded to a CAPTRUST team or teammate who has developed an idea or initiative which benefitted CAPTRUST by improving its process or revolutionizing an approach, product, or service offering.

For media inquiries regarding this press announcement, or to speak to a CAPTRUST spokesperson, please contact: CAPTRUST@ficommpartners.com. For information about joining the CAPTRUST team, visit: captrust.com/advisorgrowth/.

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 \$300 billion in client assets from its offices located across the U.S.

Legal Notice

This document is intended to be informational only. CAPTRUST does not render 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 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.

© 2020 CAPTRUST Financial Advisors