



CAPTRUST Adds Two Wealth Firms in Existing Markets

Raleigh, N.C.—December 15, 2022—CAPTRUST Financial AdvisorsÂ (CAPTRUST) today announced the addition ofÂ Generations Wealth ManagementÂ (Generations) inÂ WestÂ Des Moines, Iowa, and Kairos Private Wealth (Kairos) in Lake Mary, Florida.Â The two transactions bring five colleagues to the firm and expand CAPTRUST’s presence in Florida and Iowa, enhancing wealth practices in locations with existing institutional advisors and clients.

“A core part of our growth strategy is to pair wealth management and retirement plan advisors together in markets around the country. The combination of the two practice areas fuels incredible opportunities for new business,” said [Rush Benton](#), CAPTRUST’s senior director of strategic growth. “Generations and Kairos are two great examples of successful wealth management businesses that we are able to tuck into markets where we already have established retirement plan advisors.”

Founded in 2009 by [Julie Fuller](#) and [Michelle Mahoney](#), Generations is an all-women firm that provides family office services, financial planning, investment management, and tax consulting to clients in the Midwest.

“We are thrilled to be a part of CAPTRUST and to join the team in West Des Moines,” said Mahoney. “We knew the CAPTRUST culture was a fit with its collaborative business model of one unified practice.”

“Michelle and I look forward to tapping into the state-of-the-art technology, infrastructure, and internal partnership with the institutional advisors that will take our business to the next level,” said Fuller.

“We are looking forward to building out our wealth management practice with Generations and



Kairos,” said Benton. “Both teams will fit right into our presences in Florida and Iowa, and we will all mutually benefit from this strategic growth at the firm.”

[Taylor Bauerle](#) leads Kairos as its president and provides wealth management services to high-net-worth individuals, with expertise in tax strategy, risk management, and estate planning.

“The local team was looking for a wealth partner to bridge the gap with their institutional business. I was looking for a growth engine and found that in CAPTRUST,” said Bauerle. “CAPTRUST’s growth strategy to segue clients across the institutional and wealth sides of the business was appealing to me. By joining CAPTRUST, I can focus purely on taking care of current clients and growing my business.”

These two deals mark CAPTRUST’s 61st and 62nd transactions since 2006. Both Generations and Kairos will take on CAPTRUST branding consistent with other deals.