



CAPTRUST Continues Growth of Wealth Management Practice with Addition of Two Firms

McQueen, Ball & Associates and Cornerstone Capital Advisors bring in over \$2 billion of new client assets

RALEIGH, NC – June 25, 2019 – CAPTRUST Financial Advisors (CAPTRUST), one of the nation’s leading independent wealth management and retirement plan advisory firms, today announced the addition of McQueen, Ball & Associates and Cornerstone Capital Advisors to its growing team. These transactions bring more than \$2 billion of client assets to CAPTRUST and expand the firm’s presence in Pennsylvania and Northeast Ohio.

Founded by Jerry McQueen in 1981, McQueen, Ball & Associates manages \$1.3 billion of client assets. Located in Bethlehem, PA, this multidisciplinary team provides financial planning and investment management services for individuals, families, small businesses, and institutions.

Cornerstone Capital Advisors, led by Mario Giganti, is located in Green, OH and oversees \$770 million in client assets. The Cornerstone team utilizes goal-based financial planning to help individuals and families and serves as a “personal CFO” for high-income professionals and entrepreneurs. In addition, their fiduciary services team assists businesses and nonprofits with their retirement plans and endowments.

“McQueen, Ball & Associates and Cornerstone Capital Advisors bring growth-minded advisors and client rosters that will quickly reap the benefits of our network and scale. We are excited about the talent and expertise they bring to CAPTRUST,” said **Fielding Miller, founder and CEO of CAPTRUST**. “Both of these firms are great examples of how we are adding wealth management



services in key markets like Pennsylvania and Ohio where we already have established institutional advisors and clients.”

Earlier in 2019, CAPTRUST brought in three partners from Atlanta-based FiduciaryVest who advise on more than \$13 billion in institutional assets. This rapid growth comes after a strong 2018 for CAPTRUST that saw 21.5 percent revenue growth and \$65 billion in new client assets. The firm now has more than 200 advisors across 43 locations and advises on more than \$300 billion in client assets across its wealth management, retirement plan, and endowment and foundation lines of business.

For media inquiries regarding this press announcement, or to speak to a CAPTRUST spokesperson, please contact: CAPTRUST@ficommpartners.com.

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.