



CAPTRUST Grows Nashville Presence with Addition of TrustCore Financial

Raleigh, N.C.—January 12, 2023—CAPTRUST Financial Advisors (CAPTRUST) announced today the addition of TrustCore Financial Services (TrustCore). The registered investment advisor (RIA) is based in Nashville, Tennessee, and is led by Partner and CEO Gary Dean. TrustCore is the second CAPTRUST office in Nashville, following the addition of New Market Wealth Management in 2021.

TrustCore oversees nearly \$2.3 billion in assets and supports individuals, families, endowments, and foundations. More than 75 percent of TrustCore’s clients are located in the Middle Tennessee region. The deal brings 48 new colleagues to CAPTRUST, and the TrustCore team of 16 financial advisors focuses on a holistic approach to providing client service.

“Joining CAPTRUST takes our business to the next level,” said Dean. “The growth opportunity with CAPTRUST for our entire team is unmatched across the industry. We look forward to tapping into the valuable resources the firm has to offer to make our clients’ experience even better.”

“TrustCore is an exciting addition to the CAPTRUST family,” said [Rush Benton](#), CAPTRUST senior director of strategic growth. “Gary and his team bring decades of industry experience, and we look forward to growing our business in the Nashville area through their expertise in both individual wealth management and services for nonprofits.”

This deal closed in late 2022 and is the 63rd for the firm since 2006. Consistent with other transactions, TrustCore will take on CAPTRUST branding. Republic Capital Group served as TrustCore’s financial advisor in the transaction.



About CAPTRUST

CAPTRUST is an independent registered investment advisor founded in 1997 in Raleigh, North Carolina. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance for individuals and families. The firm also offers a comprehensive suite of services for ultra-high-net-worth individuals to simplify their financial lives, mitigate risk, and perpetuate their legacies. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis/fee benchmarking, and employee advice programs. With more than 1,200 employees across 70 locations nationwide, CAPTRUST oversees more than \$100 billion in assets under management and more than \$750 billion in assets under advisement (as of September 30, 2022).