

[Solutions](#) [Our Story](#) [Our People](#)

Find an

[News & Resources](#) [Contact Us](#)

Advisor

Our Story

Our firm was built on the premise that investors are best served by advisors who are motivated to focus exclusively on the best interests of their clients.

Core Values

**Accountability**

[Solutions](#) [Our Story](#) [Our People](#)[Find an](#)[News & Resources](#) [Contact Us](#)[Advisor](#)

Integrity

We conduct ourselves with honesty and fairness at all times and in all circumstances. We do what is right—even when it is difficult or out of fashion.



Respect

All individuals are worthy and valuable. All points of view deserve thought and consideration. We acknowledge everyone's right to dignity and use courtesy, civility, and deference in our interactions.



Collaboration

All individuals associated with CAPTRUST make worthwhile contributions to our success. We cooperate with one another, share information, solicit ideas and opinions, and appreciate everyone's engagement.





Our History

The founders of CAPTRUST joined together to provide institutional and private investors an independent and objective choice for financial advice and fiduciary support.

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 services 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, and provider analysis and fee benchmarking. The firm also offers employee wellness and advice for retirement plan participants.



- CAPTRUST ends the year with more than 1,300 employees, serving over 2,500 institutional clients, 8,000 private clients, representing \$770 billion in total assets from 82 locations across the nation.
- The CAPTRUST Community Foundation reaches more than \$8 million in funds raised to support the communities we serve that help children.
- CEO Fielding Miller signs the CEO Action for Diversity & Inclusion™ pledge, highlighting the firm's commitment to advancing diversity and inclusion within the workplace.
- CAPTRUST introduces two new employee resource groups (ERGs): Honor, for veterans, employees serving in the Guard/Reserve, military family members, and their allies and Enable, for colleagues with disabilities and their allies.

2021

- CAPTRUST surpasses the 1,000-employee mark.
- The firm establishes CAPTRUST Family Office Services to help wealthy families coordinate all aspects of their busy financial lives so that they can focus on the things that are most important to them.

2020

- GTCR, a leading private equity firm, makes a 25 percent minority growth investment in CAPTRUST, reflecting a valuation of \$1.25 billion.
- CAPTRUST creates the Inclusion & Diversity Council with the mission to foster an environment that promotes inclusion, a diverse workforce, and a strong



intersex, and asexual employees and allies.

- Women Inspire, Support, Encourage (WISE) Network, for colleagues who are women and who identify as women and their allies.
 - Despite the global pandemic, CAPTRUST continues to lean into adversity and the firm's track record of growth, ensuring that no layoffs would occur during the market downturn.
-

2018

- CAPTRUST surpasses 500 employees.
-

2017

- CAPTRUST launches a new 10-year strategic plan with goals of growing in the top 35 metropolitan markets in the U.S. and investing \$10 million in communities, among others.
 - The firm establishes the Women's Advisor Initiative, which seeks to create a more diverse community of advisors focused on recruiting, mentoring, and supporting women financial advisors.
-

2015

- CAPTRUST unveils *VESTED* magazine, a wealth lifestyle periodical designed to provide timely, relevant, and actionable ideas and recommendations to inform



2012

- CAPTRUST formally establishes two new discretionary asset management services: 3(38) for retirement plan sponsors and outsourced chief investment officer (OCIO) for nonprofit organizations.
- The firm creates the Brick Bonus program to provide a company-wide success-sharing bonus plan that rewards colleagues for a commitment to client service.

2010

- CAPTRUST moves into its new Raleigh, North Carolina, headquarters—the 17-story CAPTRUST Tower at 4208 Six Forks Road.

2008

- In response to the global financial crisis, CAPTRUST leadership reassures employees that everyone has a seat, and the firm begins to hire some of the industry's displaced professionals.

2007



-
- The firm launches its first 10-year strategic plan that includes expanding operations nationally.

2004

- CAPTRUST establishes the firm's mission statement and core values to serve as guiding principles for its culture, service, and development.
- The One Brick at a Time (OBAAT) concept is born from Miller's belief that the only way to build a world-class organization is one piece at a time: one client, one colleague, and one relationship.

2002

- The firm introduces an equity ownership plan for all employees, giving every colleague a pathway to ownership that incentivizes long-term growth and quality of care.

2001

- Despite the dotcom bubble burst and declining markets, CAPTRUST goes against the industry grain, deciding to grow by investing more capital, hiring



assets under advisement.

- The No-Golf-Ball Rule becomes CAPTRUST's cornerstone policy, reinforcing the firm's commitment as fiduciaries for clients, ensuring no conflicts of interest can arise when advising clients.

CAPTRUST Community Foundation

Our mission is to enrich the lives of children in the communities we serve.

Aspiring to our firm's mission to enrich the lives of our communities, the CAPTRUST Community Foundation, a registered 501(c)(3) charity, was organized in 2007. The goal of the Foundation is to support the appreciation of our communities by encouraging our teammates to contribute time and resources to local and national charities serving the needs of children.



The CAPTRUST Community Foundation was started by CAPTRUST employees as a way to focus a growing desire to give back. We became a 501(c)(3) nonprofit charity in 2007, specifically focused on enriching the lives of children. That same year, we were



VESTED Acquisitions Careers My Account Submit RFP

Solutions Our Story Our People

News & Resources Contact Us

Find an

Advisor



CAPTRUST COMMUNITY FOUNDATION

We're here to help.

Find an advisor today!

All Locations

Go

Company

CAPTRUST Advice

CAPTRUST Community Foundation

Careers

Contact Us

Inclusion + Diversity

Locations



Solutions Our Story Our People

Find an

News & Resources Contact Us

Advisor

Professional Certification Designations

©2023 - CAPTRUST | All rights reserved.