

We are building
financial foundations.

How can we help you?

Let's start here.

Solutions for Institutions

Solutions for Individuals

|| Pause Slider



\$630 Billion

Client assets under advisement

We are using cookies to give you the best experience on our website.

You can find out more about which cookies we are using or switch them off in [settings](#).

Local presence with the strength of
a national firm



\$112 Billion

Client assets under management



Independent

Dedicated to providing objective
fiduciary advice

The CAPTRUST Difference

Depth. Access. Leverage.

We understand that it can be very difficult to discern the differences between

CAPTRUST and its competitors. To the untrained eye, we all look the same. And yet, we offer many advantages.

We are different.

Learn more about [The CAPTRUST Difference](#).

How We Can Help

We provide investment advisory services to retirement plan fiduciaries, endowments, and foundations and wealth planning services to executives, business owners, and families.

Video Thumbnail

CAPTRUST for Institutions

As one of the largest registered investment advisors in the U.S., we offer a broad range of services to institutional clients, including corporate and higher-education retirement plans, foundations and endowments, and religious organizations.

Two things remain consistent across the breadth of services we offer and client types. Our financial advisors deliver fiduciary investment advice, always in the best interests of their clients, and we seek to add value above and beyond strictly investment returns.

[Learn More](#)

[Video Thumbnail](#)

CAPTRUST for Individuals

We have gleaned insights over the past 30 years acting as a fiduciary and investment advisor to some of the country's biggest retirement plans that we can apply to your challenges.

Our size provides us with access to best-in-class investment managers that we couple with customized wealth planning services. Our business model means that our financial advisors' interests are aligned with yours. They have no products to sell and are in a position to offer truly objective advice.

[Learn More](#)

Our Mission

Our mission is to enrich the lives of our clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation.

News & Resources

Stay informed with the latest insights and happenings from CAPTRUST.

Resources

2 days ago

Investors in Limbo as Fed and Markets Clash

Investors entered the opening quarter of 2023 on the edge...

Announcements

2 days ago

CAPTRUST Named to Barron's 2023 List

Barron's recently ranked 22 CAPTRUST advisor teams on the prestigious...

We're here to help.

Find an advisor today!

All Locations

Go

Company

[CAPTRUST Advice](#)
[CAPTRUST Community Foundation](#)
[Careers](#)
[Contact Us](#)
[Inclusion + Diversity](#)
[Locations](#)
[Submit RFP](#)

Legal

[BrokerCheck](#)
[Business Continuity Plan](#)
[Important Disclosures](#)
[Privacy Policy](#)
[Professional Certification Designations](#)



