



We are building  
financial foundations.

How can we help you?

Let's start here.

Solutions for Institutions

Solutions for Individuals

|| Pause Video

\$630 Billion

Client assets under advisement

85 Locations

Local presence with the strength of  
a national firm





## 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



## 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](#)





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

Retirement Plans

20 hours ago  
**Episode 53: “How America Saves,” with Vanguard**

In this episode, Scott Matheson and Jennifer Doss discuss the...

Retirement Plans

2 days ago  
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If managed properly, Institutional Asset Pools (IAPs), like cash reserves...

Retirement Plans

6 days ago  
**Next-Gen Plan Investment Menus**

For most of retirement plan history, pension plans were king....



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