CAPTRUST

BUSINESS DEVELOPMENT AND SALES ENABLEMENT

Our primary purpose is to proactively support and enhance our advisors' organic growth efforts.

MARKET ENGAGEMENT

- Direct prospect engagement and market coverage
- Alignment with campaigns, tactics, and initiatives
- Database utilization and best practices for financial advisors

Michael Broderick
Financial Advisor

Tom Kelly
Financial Advisor

Roger Noonan
Financial Advisor

DELIVERABLE REQUEST AND FULFILLMENT

- Understand, create, and fulfill deliverable request for prospect meetings or Requests for Proposal (RFP)
- Coordinate subject matter expert or department resource involvement
- Ensure appropriate execution for best potential outcome

Megan Cutter
Manager
RFP Support

Rebecca Hughes
Manager
RFP Support

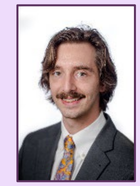
Chelsea Batts-Wood
Senior Associate
Proposal Support

DATA, INFORMATION, AND INSIGHTS

- Assist with and confirm accurate lead and pipeline information in our database
- Provide unique and aggregated firm experience and data
- Track, measure, and analyze business development activity and outcomes

Lisa Lofton
Manager

Kevin Hargrove
Senior Associate



Roth Gray
Associate II

Tanner Rosson
Senior Associate
RFP Support

Allie Killblane
Consultant
RFP Support

Esther Doucet
Associate
RFP Support

Cheryl Thorpe
Consultant
RFP Support

Kristen Lasley
Associate II
RFP Support

Cale LaSalata
Senior Consultant
RFP Support

Shireen Abukaff
Senior Associate
RFP Support

Kelly McGee
Senior Associate
Proposal Support

Haniah Gilmore
Associate
Proposal Support

Greg Middleton
Senior Director

TEAM EXPERIENCE AND EXPERTISE

- Supported **over 500** individual advisors and their growth efforts*
- Set **9,000+** prospect meetings*
- Responded to **3,000+** advisor RFPs*
- Supported **6,000+** finals presentations*
- Involved with **60+** integrated business development campaigns*
- **15-30** on demand business development support requests daily
- Assisted advisor force in obtaining over **$40 million** in organic revenue in 2022

*Since team inception

RESOURCES AND ADDITIONAL INFORMATION

- Business Development and Sales Enablement
- RFP Coordination
- Institutional Sales Content Resource Library
- Wealth Sales Content Resource Library
- Sales Support Request Tool Tutorial

For RFP support or questions contact Rebecca Hughes at Rebecca.Hughes@captrust.com **OR** advisorrfp@captrust.com. For proposal or custom prospecting deliverables contact Chelsea Batts-Wood at Chelsea.Batts-Wood@captrust.com **OR** businessdevelopmentsupport@captrustadvisors.com