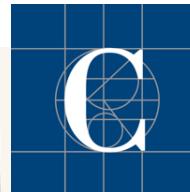


CAPTRUST

Corporate Material Update

July 2020



INTERNAL USE ONLY

Action Items and Timeline

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Description and Examples
of new materials

02

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Corporate Material Update

Description and Examples of new materials



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Description of New Materials

Over the last several months, marketing has been redesigning some of our corporate materials to give it a new fresh look. Here are the items we have updated:

- **Generic** corporate PowerPoint template
- **Pitch and review** PowerPoint template
- **Branded packaging** (blue and silver covers, blue and silver tabs, presentation folders, and pitch paper)

Examples of New Materials (PowerPoint Templates)

Below are screen shots of some of the slides within the **generic corporate template**:

**PRESENTATION TITLE IN MONTserrat BOLD,
36PT, BLACK**

Presentation Subtitle Placeholder in Montserrat, 16pt, black

Presentation Speaker Name in Montserrat, 14pt, black

**DivideR Slide Title in
Montserrat Bold**

Slide headline Montserrat 24pt, in CAPTRUST blue

Slide subhead in Montserrat 18pt, in black

Body text Montserrat 18pt, in black

- Bullet level one in Montserrat 18pt, in black
- **Text can be bold for emphasis**
 - Bullet level two in Montserrat 16pt, in black
 - Subsequent bullet in Montserrat 14pt, in black
 - **Text can be in brand colors for emphasis. Use colors with enough contrast.**
 - Subsequent bullets in Arial 16pt, black

Below is the footer design for this template

Presentation Name

C CAPTRUST

Examples of New Materials (PowerPoint Templates)

Below are screen shots of some of the slides within the **pitch or client review corporate template**:

The image displays three distinct slides from a corporate presentation template:

- Slide 1 (Left):** A slide featuring a wooden desk background with a laptop, glasses, a coffee cup, and a potted plant. The title "ABC FOUR ABC GROUP" is prominently displayed in a large blue box. Below the title, the date "March 1, 2020" is shown. The slide includes a "CONTENT" section with placeholder text and a bulleted list. At the bottom, there are bios for four individuals: Lisa Hay, Vice President, Finance; Scott T. Matheson, Managing Director; and two others whose names are partially visible.
- Slide 2 (Middle):** A slide titled "CONTENT" with placeholder text. It includes a bulleted list and a "CAPTRUST" logo at the bottom.
- Slide 3 (Right):** A slide for "CELGENE CORPORATION" regarding the "1ST QUARTER, 2020 DEFINED CONTRIBUTION QUARTERLY REVIEW". It contains contact information for CAPTRUST (1980 South Easton Road, Suite 210, Doylestown, PA 18901) and a mission statement. The slide also features a "here" placeholder and a "CAPTRUST" logo.

Below is the footer design for this template

Below is the footer design for this template

CAPTRUST

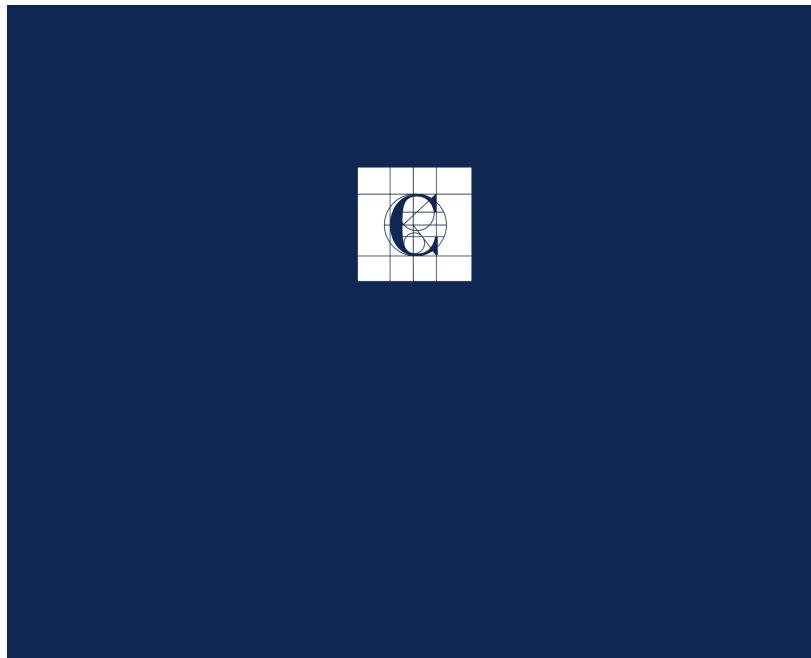


Examples of New Materials (packaging)

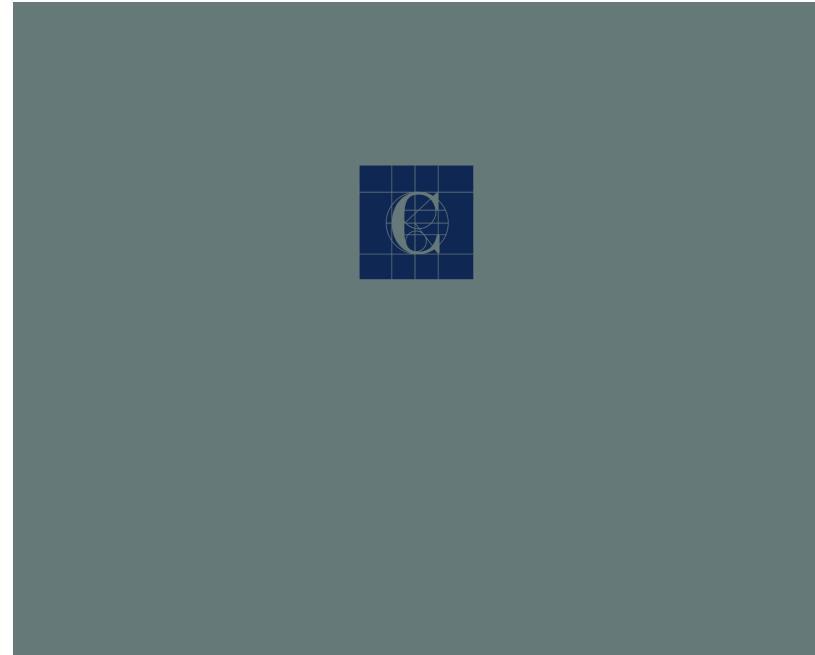
Below are screen shots of some of the slides within the **new brand packaging**.

Below are the outside covers:

Pitch:



Client Reviews:



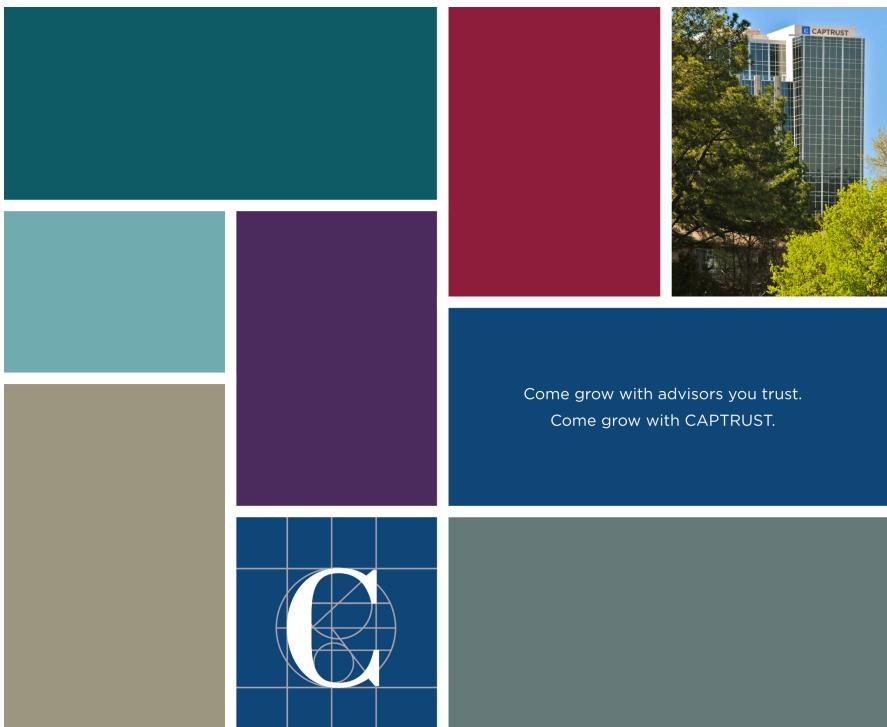
Tabs look the same with the tab include the number (just like before)

Examples of New Materials (packaging)

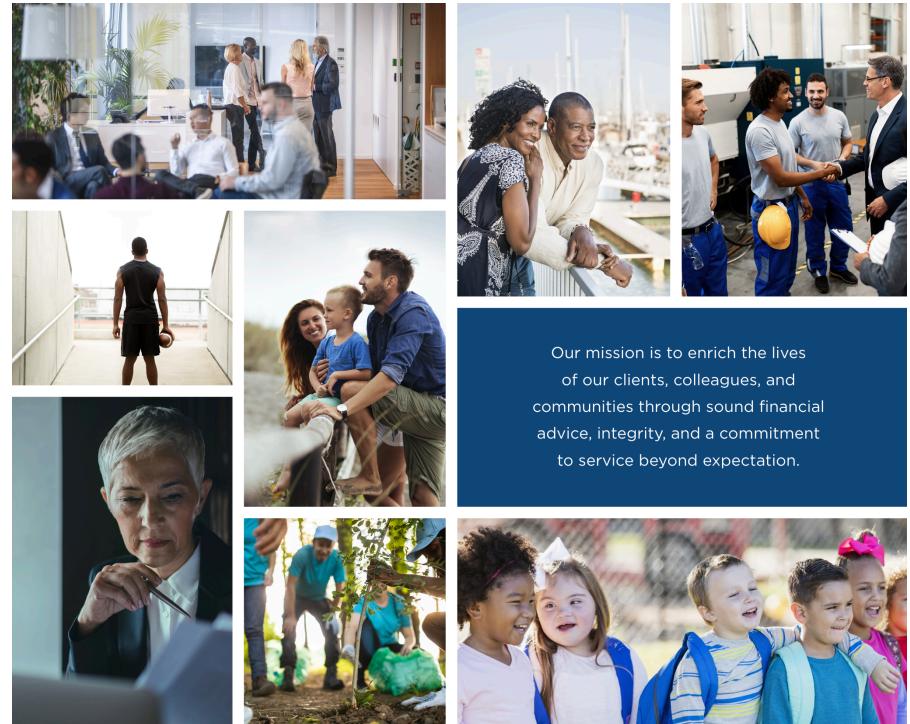
Below are screen shots of some of the slides within the **new brand packaging**.

Below are the inside covers:

Pitch:



Review:



Examples of New Materials (packaging)

Below are screen shots of some of the slides within the **new brand packaging**.

Below is the new presentation folder (shown from the back side). Logo is on front:



Corporate Material Update

Applications of new materials



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Application of New Materials

There are two PowerPoint templates to use for any CAPTRUST use.

Template Type	Generic Corporate Template	Client/prospect Template
Uses	Presentations for webinars, conferences, internal/firm presentations, vendor meetings, etc. (anything that isn't sent directly to clients or prospects)	Any client or prospect material. Pitches, reviews, benchmarks, analysis, etc.
System Integration	N/A	QRG and Proposal Generator
Location	Intranet > Marketing Department > Marketing Tools >Templates	Intranet > Marketing Department > Marketing Tools >Templates

Corporate Material Update

Rollout Plan



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Communications to the Firm

- **E-brief:** include in the July 23 email
- **Intranet:** post on July 23
- **Email** to all CAPTRUST on July 23
- **QRG** turns on July 27 with new template (Black Diamond and performance reporting have the new templates as well)
- **Meetings/communications** with other departments such after July 23
- New packaging materials will be printed, trimmed, and ready for fulfillment facilities and offices to order by July 15, 2020 (when we begin printing again). All new materials and custom materials can be ordered on the Four51 site by existing CAPTRUST administrators after July 15, 2020

Corporate Material Update

FAQs



CAPTRUST

FAQs

Q. Why did we update the materials?

A. When marketing decided to launch a new proposal generator, it was decided that it was time to update our materials at the same time so we could load all new materials inside the new generator. Also, our packaging materials were over 10 years old and needed a fresh new look. Also, there is a sizeable cost savings by moving away from the pre-printed grey-bar paper and printed covers, backs, and tabs.

Q. Has the process changed to get materials printed from fulfillment centers?

A. No, you will still send a request to the fulfillment team as you did before

Q. How do I order more stock?

A. For remote offices, you can order them from Four51. See Colby Warren for additional questions.

Q. What happens to old materials?

A. We intentionally ran small print runs of the old materials so we could control the inventory. Some may be shredded, but for extra grey bar paper, we can create notepads.

Q. If I need the PowerPoint template(s) and don't use QRG or proposal generator, where can I find it?

A. You can download templates from the intranet: Intranet > Marketing Department > Marketing Tools >Templates

Q. What do I do with “one-off” slides that are in an old template?

A. Contact Jennifer Mastrapasqua or Colby Warren and we will update the slide for you.

Q. Who to send requests to and who to call with questions?

A. Either Jennifer Mastrapasqua or Colby Warren