



## 2nd Quarter Employee Referrals

*Larry Elliott and Evan Melcher  
(Alpharetta, GA):*

*Larry shares:*

I met Evan 20 years ago when we worked on SunTrust's Institutional Employee Benefits Team. Evan and I serviced many common client relationships, Evan providing investment management support and me participant engagement. Last October, when SunTrust (now Truist due to the BB&T merger) chose to exit the institutional retirement plan recordkeeping and advisory business, I decided to pursue other opportunities within our industry. I networked with numerous advisors, recordkeepers, banks and wealth management firms. Although stressful, this gave me the chance to learn more about what other organizations were focusing on in the institutional retirement space. One evening while on LinkedIn, I noticed an open leadership position on CAPTRUST's Institutional Client Service Team. I always thought highly of CAPTRUST due to my interactions with the firm while at SunTrust and Transamerica. The following morning, I called Evan, who knew my background and understood the role I inquired about, asking if he thought I'd be a good fit and should I apply. He said yes and began to rave about what an awesome firm CAPTRUST is.

Evan let Meagan Caruso know about my interest and the interview process started a few days later. I'm thrilled to be a part of the CAPTRUST family and look forward to meeting everyone soon.

*Evan shares:*

I had the pleasure of working with Larry for over a decade and was always impressed by his leadership skills, knowledge of the retirement industry, and passion for helping plan sponsors and participants. CAPTRUST's continued growth has provided tremendous opportunities to develop internal talent and recruit outside our ranks to identify talented individuals who are culturally aligned. When Larry contacted me regarding the CMC management role, I just knew he was the right person for the job! He is a selfless leader and great developer of talent, just like Meagan and others serving in that role at CAPTRUST. I am so pleased that he joined the team and CAPTRUST is better because he is on board.



Larry Elliott & Evan Melcher



## 2nd Quarter Employee Referrals

*Lonzetta Allen and Kaylin Ridge  
(Raleigh, NC):*

*Kaylin shares:*

Lonzetta and I met in college at the Art Institute of Raleigh-Durham where we both were studying for our Bachelor's in Graphic Design. I began my college education as Lonzetta was in her last few semesters. She was well respected among her professors and peers, and I was always inspired by her tenacity and drive. During my time at the Art Institute, Lonzetta and I had a similar friend group which allowed us to get to know each other in class and in our everyday lives.

At the Art Institute we were encouraged to collaborate and connect with our peers. It was a small, close-knit school, and everyone knew each other. In our study field, there was a continuous group of front-running designers, peers that excelled and were leaned on by their other peers. Lonzetta was a leader, she was always asked to join peer reviews and critiques as her designer eye and work ethic was highly respected. As I progressed through college, I too was able to join the "elite" design students.

When I toured the college, I originally went to learn about a different design field, but when I was told about the graphic design program, I knew I needed to take the risk and dive in. I am so thankful I did. Not only did I find a career field that I love, but I got to meet and be inspired by Lonzetta, and others like her.

Lonzetta graduated from the Art Institute three years ahead of me. She and I stayed connected. We collaborated on a few

projects and saw each other at social events.

When a job opening on the creative team became available, Lonzetta reached out and asked if I was interested. Knowing my design style, she thought I would be a great addition to the team. Upon listening to her enthusiastic stories about working at CAPTRUST, I knew I had to apply. After a few rounds of interviews and a couple of agonizing weeks anxiously waiting for a confirmation, I got the call. I texted Lonzetta: "I GOT THE JOB!"

I am so grateful to Lonzetta for considering me when the position opened. I am glad to begin a career at a company where I am valued and may reconnect with a respected friend. CAPTRUST is one in a million.



Lonzetta Allen & Kaylin Ridge

## 2nd Quarter Employee Referrals

*Sue Anderson (Raleigh, NC) and  
Beryl Ball (Richmond, VA):*

*Beryl shares:*

Back in 2010, the Richmond, VA Public Schools 403(b)/457(b) (RPS) Retirement Plans became a new (and still current) client of mine. Their recordkeeping services were provided by Lincoln Financial, and Sue Anderson was the relationship manager on the Plans. There's always lots to do to on-board a new relationship and I found myself spending many hours working with Sue to successfully analyze and enhance the Plans. I found Sue to be a great partner as we worked to improve the investments, plan design, and fiduciary governance for the program. Sue also knew two FA's at CAPTRUST—Mike Pratico and Jason Stanicek—from the time they had worked at Lincoln, so our working relationship grew quickly and successfully.

After eight years at Lincoln, Sue left to join Transamerica. I was so sorry to lose her as the relationship manager on the RPS account. I had come to know her as one of the most outstanding Relationship Managers I ever worked with: knowledgeable, assertive, caring, and a joy to work with. Fortunately, we kept in touch from time to time while Sue was at Transamerica and then five years later, she became the Mid-Atlantic Regional Director for Wells Fargo Retirement Services. Once again, we were in the same geography. This time she managed other Relationship Managers, and I knew she would be very successful in that role, too. She reached out and we spent time

talking about the direction of our careers, the work we might be able to do together once again.

One of my goals as part of the Women's Initiative is to recruit more women advisors for CAPTRUST. With the recent Principal acquisition of Wells Fargo retirement services group, Sue was kind enough to reach out to let me know that she would be leaving Wells. I immediately thought she would be a great advisor here and referred her to Mike Hudson for an interview. We had several conversations about being an advisor and I know CAPTRUST and Sue will be a great fit. And as a bonus... she and I have the chance to collaborate once again, 11 years later!

*Sue shares:*

Having been on the record keeping side for over 18 years, I have worked with a lot of advisors and their firms. With some, I wonder how they sleep at night. Never with a CAPTRUST advisor. I had such positive experiences working with Jason Stanicek, Barry Schmitt, and of course, Beryl Ball—all very competent and professional vendor partners. And having attended many mutual client meetings, I saw firsthand what CAPTRUST brings to the table. I respected their





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consultative approach for the entire retirement program, not just investments.

So, when I was ready to make a move to the “other side of the table”, CAPTRUST was naturally at the top of my list. Luckily for me, the timing was perfect. Beryl reached out in January 2021 with the good news that CAPTRUST wanted to hire more women advisors. Thus began the speedy but thorough hiring process. I welcomed the interview gauntlet (6 zoom interviews in 3 hours) which gave me a chance to meet other senior leaders in the firm. I loved everything I heard. And was thrilled (and still am) to have started at the end of March. Thank you, Beryl!!



Sue Anderson  
& Beryl Ball

