

## COME GROW WITH CAPTRUST

CAPTRUST is repeatedly ranked as one of the fastest growing firms in the country. Our company's community-centric policies and business development initiatives make it the most sought-after firm for attracting and retaining top female talent.

### WOMEN'S INITIATIVE COMMITMENT

We are devoted to the success of our female advisors. With the ongoing encouragement of our leadership team, we have created a community where we exchange ideas, cultivate relationships, and create a path for women advisors to realize their individual potential.

***We Mentor. We Encourage. We Support.***

### COMMUNITY GOALS

- Grow our female advisor workforce
- Lift up all female advisors
- Award and recognize female advisors
- Support female advisors in enhancing their communities

### PROFESSIONAL ACCOMPLISHMENTS

- Sponsor, presenter, and coach of William & Mary Stock Pitch & Leadership Summit, *FA Magazine's* Invest in Women Conference, and WIPN regional events
- Made notable contributions in our own CAPTRUST Community Foundation and serve on both national and local community boards committed to pro bono services
- Ten CAPTRUST women advisors named in NAPA's 2017, 2018, and 2019 Top Women Advisors List
- Recognized in Five Star Wealth Manager listings
- Senior CAPTRUST female advisor named to the 2018 ERISA Advisory Council
- Memberships include ASPPA, CUPA, SHRM, Financial Planning Association, Estate Planning Council, and NAPA
- Published in *Wall Street Journal*, *Barron's Magazine*, and other notable industry publications
- Listed in *Barron's* Top 50 Institutional Consultants

CAPTRUST was founded in 1997 as an entrepreneurial startup with about \$2.5 million in client revenue and 12 employees.

Today, CAPTRUST is the nation's largest registered investment advisor with more than \$364 billion of client assets under advisement.

We provide consultative advisory services to retirement plan sponsors, foundations and endowments, executives, professional athletes, and affluent families.



## WOMEN ADVISOR LOCATIONS

- AUSTIN, TX
- ALLENTOWN, PA
- BETHLEHEM, PA
- BIRMINGHAM, AL
- BOSTON, MA
- CINCINNATI, OH
- CORPUS CHRISTI, TX
- CLARKSTON, MI
- DALLAS, TX
- DAYTON, OH
- DES MOINES, IA
- GREEN, OH
- HARRISONBURG, VA
- HOUSTON, TX
- LAKE SUCCESS, NY
- LEWES, DE
- LOS ANGELES, CA
- LYNCHBURG, VA
- MINNEAPOLIS, MN
- NASHVILLE, TN
- PORT WASHINGTON, NY
- RALEIGH, NC
- RICHMOND, VA
- RIVERSIDE, CA
- SAN ANTONIO, TX
- SAN RAMON, CA
- SANTA BARBARA, CA
- TAMPA, FL
- WASHINGTON, DC

## BY THE NUMBERS

**37%** of CAPTRUST leadership team are women

**27%** of our advisors are women

**#1** Biggest RIA in the U.S. in 2016, 2017, 2018, and 2019\*

**39** dedicated research analysts

**9,200+** institutional and private wealth clients

**3 million+** retirement plan participants in 50 states

**98%** average client retention rate since 2007

**21** different industry designations, including

- AIF®
- AIFA®
- ARPC
- CeFT®
- CFA
- CFP®
- CPFA



“CAPTRUST provides a culture where your opportunities are only limited by your imagination and your ambition.”

*- Jean Duffy, CAPTRUST Advisor*



\*Financial Advisor Magazine RIA survey and ranking in the category \$1 billion+ in assets under advisement. Data as of 01.2020