

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 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 members 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



"The power of possibilities at CAPTRUST is limitless."

- Cathy Seeber, CAPTRUST Advisor



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