



Centralized Trading

The trading team maintains all aspects of client trading, rebalances accounts, executes tactical changes, and raises and invests cash on behalf of clients. On the institutional side, trading also oversees portfolio transitions in order to ensure timely execution and help manage risk. The group ensures best execution by considering product type, timing, venue, market conditions, and the needs of the client. Centralized Trading verifies the accuracy of all orders both pre and post execution.

Centralized Execution

Fixed Income Trading

Institutional Trading

Organization Chart



Raggio, Andrew
Director



Barnett, Kevin
Trader III



Beckwith, Anne
Team Leader



Fortunato, Joe
Trader II



Hamann, Jeremy
Intern



Hudson, Joshua
Director



Natarajan, Gauth...
Senior Team Lead

Team	When to Contact	Email Address	Extension
Wealth Trading	D1 general wealth trade inquiries and time sensitive inquiries involving specific trades	Trading@captrust.com	10600
Wealth Trading	General, non-urgent, trade inquiries	IG.TradingTeam@captrust.com	10600
Institutional Trading	Non-Discretionary Institutional trade and TFR inquiries	AL_Trading@captrust.com	
Fixed Income Trading	Fixed Income trade inquiries and time sensitive inquiries	FI_Trading@captrust.com	
D2 Team	For inquiries involving accounts managed within domain 2	ig.d2.portfolio.implementation@captrust.com	
D3 Team	For inquiries involving accounts centrally managed in a domain 3 strategy	ig.d3portfolio.implementation@captrust.com	44200
Trade Errors	All discovered trade errors	Trade_Error@captrust.com	10600

Events Calendar

[See all](#)

+ Add event

MAY
15

Sell CCLFX

Mon, May 15, All day



MAY
19

Sell VCRRX

Fri, May 19, All day



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Resources

Bulk Trade Uploader MF Equity
ETF 10 12 2022

Centralized Trading Ticket
Procedure 09.20.2022

Trade Error Matrix

Interval Fund Redemption
Procedures

Bulk Trade Uploader Fixed Income
2022_11_25

Error Correction Spreadsheet

Institutional Trading Overview