



## Q1 2022 Employee Referral Stories

*Grey Kennedy and Sarah Majeski  
(Akron, OH)*

*Grey shares:*

Sarah and I previously worked together at a competing firm. She stepped in to fill the shoes of another person on my team who was no longer with us, which was challenging as the previous person was highly regarded. Sarah immediately won all the clients over and was able to smooth out a difficult transition period—she did this not only with her knowledge but also through her positive attitude and friendly demeanor. We became friends outside of work as well—Sarah and my wife were active in various women leadership initiatives. So, Sarah and her husband Dan would occasionally get together with us for happy hours, dinners, concerts, and such.

Well advance down the road a couple years, and I am now at CAPTRUST while Sarah is still at the previous competing firm. And she was doing a phenomenal job under some tough conditions. She even was beating us on a deal here and there. We competed on the same opportunity in 2021, which CAPTRUST won as a new client. We were told by that new client what a great job the other advisor team's point-person had done during the sales cycle, and it was Sarah. Steve Wilt mentioned this during a weekly team meeting, and I indicated I was not surprised and that I knew Sarah well. I connected Steve with Sarah and here we are—delighted to have her on our team! She brings a new set of eyes/ideas to our team that are going to be helpful in taking us to the next level.



*The Akron, OH team:  
Steve Wilt, Sarah Majeski,  
Grey Kennedy, Suzy Cottrill,  
Paul Stibich, and Megan Nall*



## Q1 2022 Employee Referral Stories

*Kwame James (Atlanta, GA) and  
Priti Jha (Cincinnati, OH)*

*Kwame shares:*

I met Priti when I joined PNC's wealth management team. I quickly bonded with her because she is warm, welcoming, and very bright. Also, Priti and I found that we shared a lot in common—we both have smart, strong-willed daughters, we were both studying for the CFA (and were quite miserable as a result), and we have a strong love/appreciation for portfolio management and the positive difference our knowledge and skills can make in our clients and their progenies lives. Priti and I would often go for morning coffee and catch up on work, family, and client issues.

When I learned that CAPTRUST had a need for an additional portfolio manager, I immediately thought of Priti. I was certain her strong experience, professionalism, hard-working mentality, and amazing personality ensured she would seamlessly fit into the CAPTRUST culture.

*Priti adds:*

Kwame and I worked as Portfolio Managers in Cincinnati for PNC's Wealth Management office that serves High Net Worth and Ultra High Net Worth Individuals. At PNC, we spent a lot of time talking about markets, portfolios, and investment strategies. I am lucky to call Kwame my friend. He is knowledgeable and cares deeply about his clients, friends, and family. He encouraged me to apply to CAPTRUST because he felt that my portfolio management skills and our shared values would make me a great fit for the CAPTRUST culture. I am happy to be part of the CAPTRUST team, and in the short amount of time I have been here, I have had so much support and opportunity to apply my skills to benefit my team and build relationships. I look forward to continuing to help our team grow meaningfully, and I enjoy working with our cohesive and talented group.



*Kwame James*



*Priti Jha*



## Q1 2022 Employee Referral Stories

*Larry Elliott and Donna Killebrew  
(Alpharetta, GA)*

*Larry writes:*

Donna and I met approximately ten years ago when we worked on the SunTrust (now Truist) Institutional Employee Benefits team. Donna supported SunTrust's Institutional sales team, so we collaborated on vendor management, RFPs, sales pitch decks, and finals presentations. Following SunTrust's decision in October 2020 to exit the institutional retirement plan business, Donna and I left SunTrust, but we kept in touch. In May 2021, I joined CAPTRUST and quickly realized I made the right decision due to the firm's genuine focus on its clients, colleagues, and communities. Late last year, I encouraged Donna to apply for one of the open Institutional CMC positions at the firm. Due to Donna's experience in the industry, attention to detail, and strong interpersonal skills, I knew she'd be a perfect fit for CAPTRUST. In early February, Donna interviewed with the firm, and her first day was February 28. Donna serves on Steve Schott's Religious Services Team and works out of the Alpharetta office.

*Donna writes:*

I was fortunate to work with Larry during my previous career at SunTrust (Truist). Larry was a well-respected manager on our team, and I was thrilled to learn he had joined CAPTRUST after our Truist days ended. When I began my job search, CAPTRUST was one of my top choices to start the next chapter in my career. I feel very fortunate that Larry recommended me for an open Institutional CMC position, and that I am now a member of the CAPTRUST family. While my office is in Atlanta, I recently visited the Raleigh office to meet several of the Schott Religious Services Team members who I will work closely with every day. While touring the Raleigh office, I knew I had made the best choice. Thank you, Larry, for referring me. I look forward to my future at CAPTRUST.



*Donna Killebrew and  
Larry Elliott*