



Q3 2022 Employee Referral Stories

Will Froelich and Thomas Coast (Phoenix, AZ)

Thomas writes:

Will and I have known each other for almost four years to the day. We met through a group at our local church in Phoenix. I was teaching high school at the time and had always felt a calling toward finance. We had a few conversations on the subject, and I asked him to coffee to inquire about career as well as potential opportunities at CAPTRUST over the summer break. It was a good conversation, but Will politely let me know they didn't typically hire high school teachers for their summer internship program! However, the momentum had begun, and I continued to look for opportunities in finance, which eventually led me to JPMorgan. I had been there for almost a year when I ran into Will at a social gathering. We started catching up and that conversation ultimately led to talking about a position at CAPTRUST. Soon after, I was introduced to Nathan Erickson, Brad Lemon, and the rest is history. It's been a great six months thus far. The firm's dedication to customer service, intellectual research, and professional experience is truly admirable. I'm looking forward to many more years and growing with CAPTRUST.



Thomas Coast and Will Froelich



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Stephanie Zegar (Raleigh, NC) and Ingra Wilson (Chicago, IL)

They share:

Stephanie and Ingra's friendship goes back 17 years. They first met in 2005 while working at the Principal Financial Group non-qualified office located in Raleigh, NC. They worked together on a team that serviced over 200 non-qualified clients and financial advisors. Their focus was on administering 409A, 457b, and 457f plans. They handled coordinating quarterly reporting, annual enrollment, contributions, distributions, participant questions, plan financing options, among many other functions.

Ingra moved to Maryland in 2007 and continued her career with Principal in the 401(k) division. Stephanie continued working at Principal until joining CAPTRUST in 2013. Stephanie and Ingra remained in contact throughout the years. When Ingra reached out about possible opportunities at CAPTRUST, it was apparent that with her client service background and experience with the diversity and inclusion program at Principal Financial Group, she would be a great addition to CAPTRUST and our culture. Ingra joined CAPTRUST as Institutional Client Management Consultant in May 2022. Stephanie and Ingra are very excited to work together again!



Then (2006) – Stephanie Zegar
and Ingra Wilson



Now – Stephanie Zegar (Left)
and Ingra Wilson (Right)



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Kim Griggs-Murray and Candis Trisby (Charlotte, NC)

Kim shares:

A rainy Friday afternoon in May and a chance meeting. Kim stepped out of the CAPTRUST office to go to her car. She noticed a young lady wearing a beautiful purple dress. “Hey, I love your dress and the color!” Thank you was the reply. Kim also noticed the young woman had on what appeared to be a graduation hat. “Did you just graduate? And from where?” “Yes”, the young woman responded and “from Central Piedmont Community College.”

The conversation continues... What was your degree? “Accounting and Finance.” That’s good to hear, we are hiring in our Wealth Management Department if you are interested? “Sure.” Let me give you my card, better yet, do you have minute. “Sure.” Let’s step inside, and let me introduce you to my colleague Wendy Reid, she is part of the hiring team. Introduction made; Wendy provided her business card. A day later, Candis Trisby sent over her resume. As they say, the rest is history. Candis has been a joy to work with, and I am so proud to have her as our CAPTRUST colleague.



Kim Griggs-Murray and Candis Trisby



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Josh Hohlfelder and Chris Labbe (Boston, MA)

Josh writes:

Chris and I have known each other for around 7 years. We met and became friends when we worked together at an RIA in Middletown, RI, from 2015-2019. After I left the firm, Chris and I stayed in touch, and when he was looking to make a move, we happened to have a job opening in our office. The timing worked out perfectly. We are all very happy to have Chris join the team here in Boston!



Chris Labbe and Josh Hohlfelder