



Q2 2022 Employee Referral Stories

Joel and Gosia Sutcliffe

Joel writes:

A spouse is supposed to have your back in every aspect of life, and that includes your career. When my wife, Gosia Sutcliffe, joined CAPTRUST as part of an acquisition we learned quickly what a great company it was. She would rave about her colleagues and clients in flattering terms, and I knew one day I would like to join CAPTRUST as well. As it happened that opportunity came this year. While I was searching for a new job, unbeknownst to me, Gosia was also searching. She found the perfect position for me, as a Client Management Consultant in the Bethlehem, PA, office. Using the employee referral program, she was able to get my application in for the position. I am not sure if my new opportunity would have come around if not for the employee referral program. Fun fact: this isn't the first time we are working for the same company. Previously, we worked for the same restaurant (where we met) and Zurich Insurance Company in Dublin, Ireland.



Joel and Gosia Sutcliffe



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Jeremy Freifeld and Jon Meyer

Jon shares:

Jeremy and I met each other through Temple Beth Or (TBO), a Reform synagogue in Raleigh, NC. The connection at TBO blossomed into a business relationship with an approved outside business activity in which Jeremy served as corporate counsel on a variety of legal matters.

Fast forward around five years, and our General Counsel Christina Markel-Balleza posted on LinkedIn that she was looking for a great corporate attorney to join the team. I reshared with my network, which included Jeremy. Jeremy reached out to me to ask about the role and the company. I told him how wonderful the environment is, the great growth prospects for the firm, and, of course, the free cappuccinos! Jeremy was intrigued, so he applied, and the rest is history.



Jeremy Freifeld



Jon Meyer



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Joe Mascia and Russel Malko

Joe writes:

Russell and I met back in 2019 when we both started working at Merrill Lynch as financial service representatives for the 401(k) and retirement benefits center. We quickly found that we shared similar interests in sports, music, and weekend activities while we studied to take our series 7 licenses together. As we grew with the times and the company, we moved on to different roles. We still maintained communication during our lunches, breaks, and daily Skype chats. After I departed Merrill, I found a new home at CAPTRUST and told Russell about the many exciting opportunities and wonderful work/life balance that CAPTRUST offers to their employees. He was immediately interested in the role, and after a few weeks of interviews, we can proudly say that we are working together to support the Chicago office for CAPTRUST!



Joe Mascia

Russel Malko



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Colby Warren and Crystal Henderson

Colby shares:

The battle was set. Our CAPTRUST corporate band, The Rollovers, was filled with so much talent that we had enough singers and musicians to form two bands and duke it out on stage in a battle of the bands format. An ideal date, time, and venue was identified: the 2022 Shareholder's Retreat in Raleigh.

At one of the rehearsals for the competition, vocalist Drew Battle asked if he could invite a ringer vocal coach to help us out. We all said sure since we were in it to win it. This is how I met Crystal Henderson. She quickly impressed with her experience (former singer with David Letterman's band on the Tonight Show), expertise, energy, guidance, and great ideas.

A CAPTRUST lightbulb went off in my head, and I started to ask her questions about her current employment situation. I gave her my best "why I love working at CAPTRUST" speech, and she followed up with her resume and highlights. I immediately submitted it along with a strong recommendation to the resumes@captrust.com email address. She nailed it and got the job!

My takeaways: Treat all your friends, family, and new acquaintances as potential colleagues. Tell them, and more importantly, show them why you love working at CAPTRUST. It is worth it to you and of course our fantastic company.



Crystal Henderson and Colby Warren



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Elizabeth Banda and Ashley Tshuma

Elizabeth shares:

Ashley and I share a heritage and a culture. We were both born in Zimbabwe and speak Shona, a native language from Zimbabwe. Now we have a new shared cultural experience, the CAPTRUST culture. When I found out Ashley studied finance and accounting, I began recruiting her to apply at CAPTRUST so she could also experience the CAPTRUST Way and have opportunities to advance. Our families get together often—we spend holidays, weekends, and celebrations together—and now we have even more in common.



Ashley Tshuma and Elizabeth Banda



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Taisha Mial and Jay Hall

Taisha says:

Jay and I started our professional relationship in 2007 at Wachovia Bank (now known as Wells Fargo Bank). Personal career development and advancement brought us to work in the same department. In 2013, our professional relationship strengthened with our daily collaboration while building our book of business as Client Account Managers in Institutional Retirement and Trust. In 2015, we advanced our careers and transitioned to the Sales Department as Internal Sales Partners. Unfortunately, the Sales Department was part of an acquisition in 2020. Afterwards, Jay and I remained in contact, and he joined the CAPTRUST Team in 2021. Jay was diligent, intentional, and consistent with providing me with information on CAPTRUST, and why I needed to join the team. Effective March 23, I made the best decision in my career development and joined the CAPTRUST team.



Taisha Mial



Jay Hall



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Dawn McPherson and Cat Ellis

Cat writes:

Not many people know that I *actually* grew up in the Kansas City area. The story of how we managed to attract and capture our new Retirement Director, Dawn McPherson, is a story akin to the six degrees of separation from Kevin Bacon. Both Dawn and I lived in the Kansas City area for a long time. We both worked at American Century for around a decade but not at the same time. We both love sports like running, triathlons, and volleyball. We spent years in the same industry, working for similar firms, and running in similar circles but didn't officially meet until the 2019 NAPA conference in Las Vegas—hence the six degrees! This was the beginning of a beautiful friendship that has grown since. As an institutional advisor with strong family and friend ties in the KC area, I've been working to build out my client base there as well as in Texas, but I found that people still like a local connection. I have always greatly respected Dawn. I knew her well as her reputation in the industry surpasses my history with her by years. So selfishly, I wanted Dawn on my team. But the only way I knew to do this, in the beginning, was to try and convince her that joining us as an advisor was the right thing for her! No doubt she would have crushed it as an advisor, but her experience and skills in leading teams, creating advisor resources, and supporting an entire retirement practice were too great to *just* pursue and service a personal book of business. She can do so much more, and she knew this, too. Dawn was enamored by our culture and capabilities but wasn't called to the advisor role. We left it that we would continue to stay in touch as friends and if anything that would more fully utilize her strengths came along, I was to let her know immediately. Two weeks later, our beloved Phyllis Klein announced her retirement. Phyllis was hugely instrumental in my early success, and her loss would be felt. It was at this moment that I knew that the stars had aligned. I called Dawn to share the news and the eventual opportunity, and she was very interested in learning more. My admiration and respect for Dawn intensified watching her through the shared discovery process as she learned more about us, the firm's vision, and how she could integrate and grow with us! We are blessed to have Dawn on our team, and I'm so thankful to call her a friend.



Cat Ellis and Dawn McPherson



Q2 2022 Employee Referral Stories

Joe Flowers and Jennifer Doss

Joe writes:

I worked as a Relationship Manager at Northern Trust when I met Jennifer Doss in 2015/2016. We worked together on a strategic relationship between CAPTRUST and Northern Trust, where CAPTRUST could offer Northern Trust's Collective Investment Trust's (CIT's) as a potential investment option to their clients. Jennifer demonstrated great leadership in knowing how to motivate an investment manager, understanding the importance of transparency, identifying potential clients and mapping of investments. In turn, Northern Trust worked with Jennifer's team to consolidate all the paperwork requirements for various client scenarios (discretionary vs. non-discretionary) and provided a single point of contact for servicing needs. Jennifer was the linchpin in the success of both firms working together.

When working with CAPTRUST, I was impressed by the growth and corporate culture. I worked with various groups at CAPTRUST (Client Management Consultants, Advisors, members of the Asset Liability team), and it was always a great experience—everyone was responsive, accountable, and easy to work with. Knowing the history of CAPTRUST and experiencing the values firsthand, I saw an opportunity with the acquisition of the Ellwood office in Chicago and contacted Jennifer for some insight. I am happy to be a CAPTRUST Senior Client Management Consultant!



Joe Flowers



Jennifer Doss



Q2 2022 Employee Referral Stories

Connie Carpenter and Michelle Jonke

Connie says:

I was ready to look for a new opportunity, but the job hunt can be overwhelming. So, I reached out to a former colleague, Michelle Jonke, just to see if she could keep her eyes open for me—she is great at networking, while I am not. She said, “Oh, I have the perfect job for you; I cannot believe that I did not think of it before!” She explained the role and stated that this position would be her direct supervisor. She reported to me at a past company, so I asked, “Are you ready to report to me again?” She said “Absolutely!” So, I applied and went through the interview process. I am grateful for the opportunity that CAPTRUST has given me.

If you have a friend, family member, or past colleague that would be a great addition to CAPTRUST, reach out to them! The job hunt is very intimidating, and our open positions might not be seen by them. Be proactive and post open spots on LinkedIn. There is talent out there, we just need to find it!