



Q4 2022 Employee Referral Stories

Daniel Kwasny (Raleigh, NC) and Kirsten Smith (Chicago, IL)

Dan shares:

I was introduced to CAPTRUST by Kirsten Smith. I met Kirsten via Matt Murphy in 2019, when both were with Ellwood, and I was with another consulting firm that was being acquired. My hope in speaking with Kirsten was to see if Ellwood needed help with performance reporting. Kirsten and I had a great conversation, but Ellwood wasn't in need of someone like me at the time. In mid-2022, I received a text from Matt who wondered if I would be interested in connecting with Kirsten again. I immediately jumped at the chance. She and I had another great discussion about where CAPTRUST performance reporting was with the system migration process and how there was a need for leadership and subject matter knowledge. She connected me with Grant Verhaeghe which led to me being hired by CAPTRUST. Networking with someone three years ago got me here today!



Daniel Kwasny



Kirsten Smith



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Jean Duffy and Amanda Rhoades (Des Moines, IA)

Jean shares:

Amanda asked a gentleman in the financial services industry if there was a woman in the Des Moines area that he would recommend as a potential mentor. He recommended me, so she reached out to set up a meeting. We had a conversation about our backgrounds and then talked about the overall industry. At the end of the conversation, I told her we were looking to fill a couple of positions in Iowa, if she wanted to consider a change. I suggested she check them out on our website. She reached back out to discuss the opportunities. After another meeting, she decided she was interested and wanted to know the steps to take to be considered for one of the positions at CAPTRUST.



Jean Duffy



Amanda Rhoades



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Audrey Wheat (Raleigh, NC) and Nicole Becker (Lone Tree, CO)

Audrey writes:

Nicole (Niki) and I have known each other since 2008 when she was the new hire trainer during my first role in the financial industry at T. Rowe Price in Colorado Springs, Colorado. Niki and I continued to work together throughout my time at T. Rowe Price where we both provided participant education and meeting coordination for the traveling retirement education team. I've always known Niki as an incredibly detail-oriented person who loves learning and growing in her roles.

Fast forward to July of 2022, when I was visiting “home” in Colorado Springs, and Niki and I made plans to hike the Manitou Incline—2,744 steps straight up the face of a local mountain. While we were hiking, Niki let me know that after 16 years at T. Rowe Price, she was ready to leave and move to a different side of the business. Knowing the breadth of her knowledge and her ability to pick up things quickly, I knew she would be perfect for a client management consultant (CMC) role supporting an advisor team.

I am incredibly grateful to have stayed in touch with Niki after so many years and feel lucky for her to have joined CAPTRUST!



*Shown: Audrey Wheat and Niki Becker, at top
of the Manitou Incline in 2022*



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William Blair and Katherine Queen (Charlotte, NC)

William shares:

In August, our client management consultant (CMC) decided that she wanted to leave the firm to enter the nonprofit space, so, for the second time in 2022, I was in desperate need of a great CMC. That weekend I was at the beach, and I ran into an old colleague of mine from the Private Bank at Wells Fargo. He asked me how things were going at CAPTRUST, and I shared my woes of needing a new CMC. He immediately responded by saying that I must hire Katherine who had supported him at the Private Bank, and he said, "William, she made me better, and you and your team would be wise to hire her immediately!" I scheduled a lunch with her the next week and within the first ten minutes of meeting Katherine, I knew that she was exactly what we were looking for. We quickly set up an interview and hired her. She has made my life and work so much better since she arrived, and I feel fortunate to work with her. I can say unequivocally that she has made everyone on our team better, and she is a great ambassador of the CAPTRUST culture.



Shown: Katherine Queen and William Blair



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Helen Marshall and Phyllis Tuttle (Raleigh, NC)

Helen shares:

Four generations and almost 100 years ago is where this friendship first started. Our families have been friends for nearly a century, each generation being tightknit. My father was a part of Phyllis's wedding, and I spent holidays with members of Phyllis's family. However, we did not get introduced until Phyllis heard that I was looking to relocate back to North Carolina from Savannah, Georgia. One fateful evening, we had an introductory call, hit it off, and the rest is history!

Our story is a prime example of the power of networking and word of mouth. We spend more time with our colleagues than we do with our families; hiring those we trust and who share CAPTRUST's values leads to happier, more cohesive, and productive teams, furthering the longevity of our mission. It often turns out that we have someone right in front of us that could make a huge impact in continuing CAPTRUST's legacy.



Shown: Phyllis Tuttle (left) and Helen Marshall (right)