

How To Access Client Files in CapConnect

CONTACT

Aanenson, Kasey

Owner
Heppner, Kyle

There is already a participant with this email address, search contacts using the email address to locate this record.

Summary

CONTACT INFORMATION

Contact Type

--

Full Name*

Aanenson, Kasey

Middle Name

--

Nickname

--

Job Title

--

Primary Email*

kaanenson@holmesmurphy.com

Secondary Email

--

Direct Phone

--

Home Phone

--

Business Phone

--

Mobile Phone

--

Fax

--

ADDRESS

Send Mail To

--

Dear:

--

Address*

Sioux Falls 57108

RELATIONSHIP TYPE

Participant

☒

Client Contact

☐

Firm Contact

☐

COI Contact

☐

Prospect

☐

Vendor Contact

☐

CAPTRUST Employee

☐

Primary Contact

☐

R&A Type

☐

ACTIVITIES

NOTES

All | Add Phone Call | Add Task | ...

Retirement Blueprint Activity

Modified by Service, CRM_Integration 4/25/2018 9:02 AM

PARTICIPANT

Plan*

Holmes Murphy 401(k) Plan

Client*

Holmes Murphy & Associates, Inc.

Pas Service Type

Full Service

Plan Type*

401(k)

Discretionary Type

3(38) - Plan Level Only

PARTICIPANT

Plan*

Holmes Murphy 401(k) Plan

Client*

Holmes Murphy & Associates, Inc.

Pas Service Type

Full Service

Plan Type*

401(k)

Discretionary Type

3(38) - Plan Level Only

1. Click on the client name hyperlink

Common

- Office 365 Groups
- Office Group Documents
- Plans
- Accounts
- Contacts
- Addresses

Service

- Activities
- Appointments
- Audit History
- Import Logs
- Institutional Research ...
- Fund Change Process

Finance

- Institutional FCR
- Fund Change History
- Trade Flow Requests

Service

- Groups & Strategies
- DB TFRs
- Team Members
- Close Relationship Act...
- Plan Benchmarking Su...

Finance

- Invoices
- Contracts
- Bill To

Sales

- Leads
- Opportunities

Marketing

- Marketing Lists
- Email Events
- Sent Emails
- Unsubscribes

Client Information

Client Name	Holmes Murphy & Associates, Inc.	Anniversary Date	12/10/2010	Client type	Institutional
Parent Account	--	O/A/R *	Acquired	Acquisition *	Des Moines
Account Number	--	Won Opportunity	--	Kimley-Horn	
Main Phone	--	Termination Date	--		
Office Group Link	https://captrustadvisors1.sharepoint.com/sites/HolmesMurphy				

CONTACTS

Full Name ↑	Primary Email	Business Phone
Brauch, Marty	mbrauch@holmesmurphy.com	
Burt, Cameron	cburt@holmesmurphy.com	
Buttolph, Heidi	HButtolph@holmesmurphy.com	(515) 223-7012
Casey, Kevin	kcasey@holmesmurphy.com	
Cooling, Kari	kcooling@holmesmurphy.com	800-300-0325
Freeman, Erin	efreeman@holmesmurphy.com	(515) 223-7014

ACTIVITIES NOTES

No Notes found.

ACCOUNTS

No Account records found.

Financial Summary

Current Assets	\$116,796,080.66	EOQ Assets	\$116,796,080.66	EOY Assets	
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Active

2. (above) Click on the down arrow in uppermost nav bar next to client name to reveal expanded menu and then click on Office Group Documents on the left.

Participant Ad...

Clients > Holmes Murphy & A... >

CLIENT

Holmes Murphy & Associates, Inc.

<div> <div>General</div> <div> <input type="radio"/> _CAPDIRECT <input type="radio"/> TFR <div> <input type="radio"/> Correspondence <div> <input type="radio"/> 2009 <input type="radio"/> 2010 <input type="radio"/> 2005 <input checked="" type="radio"/> 2006 <input type="radio"/> 2011 <input type="radio"/> 2001 earlier <input type="radio"/> 2008 <input type="radio"/> 2007 <div> <input type="radio"/> Notices <div> <input type="radio"/> 2018 </div> </div> </div> </div> </div> </div>	<div>File Name</div> <div> Amendment No3.pdf Corrections to Principal account due to ESOP Rollover.doc DollarCostAveraging.pdf Fidelity Advisor Fees for McManus2006.xls HMA Roth Amend Ltr.doc Profit Sharing Default Listing.xls Profit Sharing DefaultListing030906.xls Rebalance announcement.doc RebalanceFlyer.pdf Roth Elections071506.xls </div>
--	--

3. (above) Select the folder on the left to reveal a listing of files within on the right.

The process is similar with Trade Flow Requests:

CAPTRUST

Financial Advis...

Trade Flow Requests > 62350 - Kelly S. Shag...

SHARE SECURED FIELDS EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT

TRADE FLOW REQUEST

62350 - Kelly S. Shager Rollover IRA

Status
Settled

TFR Type*
Wealth

Assigned To
Jensen, Jordan

Days on Queue
1

General

Account #
937914252

Account Name*
Kelly S. Shager Rollover IRA

Plan
--

TFR #
62.350

TFR Type*
Wealth

Client
Shager, Paul J. and Kelly S.
Hargrove, Michael

CMC

Lead Consultant*
Crank, Steve

Custodian*
TD Ameritrade

Rep Code*
LYF

Model
D&G Portfolios

Details

As of Date
--

Trade
Directed

Status
Settled

Queue Date
8/15/2018

Owner*
Burnley, Kathy

Current Acct MV
--

Special Instructions
--

Current Cash
--

Directed

Trade Type	Symbol	Quantity ...	Amount (...)	Market/Limit	Price	Time In Force	Sol/Unsol	Discretionary	Notes	Created On ↑
Buy	VCRRX		\$15,000.00	Market			Solicited	Discretionary		8/15/2018 3:13 PM

Details

Trade Details
Directed

Trade Date
8/15/2018 11:12 AM

Trader Notes
MUTUAL FUND

Trade Entered By
Jensen, Jordan

Days on Queue
1

Attachments

Office Group Link
https://captrustadvisors1.sharepoint.com/sites/ShagerPaulJandKellyS/Shared Documents/General/17 - TFR/4f3aeb2c-bfa0-e811-8175-e0071b6ab021

Folder	File Name
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State Code
Inactive

Inactive

Read only

link may not work

1. Click the client name hyperlink in upper right
2. Continue via 2-3 above