

## Our Story

**Our firm was built on the premise that investors are best served by advisors who are motivated to focus exclusively on the best interests of their clients.**

## Core Values

**CAPTRUST's core values represent the firm's collective heartbeat and direct how we serve our clients, relate to our colleagues, interact with our vendors and partners, and address our communities.**



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### **Integrity**

We conduct ourselves with honesty and fairness at all times and in all circumstances. We do what is right—even when it is difficult or out of fashion.



### **Respect**

All individuals are worthy and valuable. All points of view deserve thought and consideration. We acknowledge everyone's right to dignity and use courtesy, civility, and deference in our interactions.



### **Collaboration**

All individuals associated with CAPTRUST make worthwhile contributions to our success. We cooperate with one another, share information, solicit ideas and opinions, and appreciate everyone's engagement.



### **Community**

We have a profound responsibility to share our success. We contribute time, money, and energy to our communities and to assist those in need,

particularly underprivileged children.

## Our History

**The founders of CAPTRUST joined together to provide institutional and private investors an independent and objective choice for financial advice and fiduciary support.**

CAPTRUST is an independent registered investment advisor founded in 1997 in Raleigh, North Carolina. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance services for individuals and families. The firm also offers a comprehensive suite of services for ultra-high-net-worth individuals to simplify their financial lives, mitigate risk, and perpetuate their legacies. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, and provider analysis and fee benchmarking. The firm also offers employee wellness and advice for retirement plan participants.

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## Our mission is to enrich the lives of children in the communities we serve.

Aspiring to our firm's mission to enrich the lives of our communities, the CAPTRUST Community Foundation, a registered 501(c)(3) charity, was organized in 2007. The goal of the Foundation is to support the appreciation of our communities by encouraging our teammates to contribute time and resources to local and national charities serving the needs of children.



The CAPTRUST Community Foundation was started by CAPTRUST employees as a way to focus a growing desire to give back. We became a 501(c)(3) nonprofit charity in 2007, specifically focused on enriching the lives of children. That same year, we were thrilled to have raised \$5,000 to help kids. Now, 10 years later, we are able to raise hundreds of thousands of dollars.

The majority of the money for the foundation is donated by CAPTRUST employees and matched by a generous donation from the company. Given our origins and our connection, the foundation's relationship with CAPTRUST is near and dear to our hearts. We are extremely grateful.



We're here to help.

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CAPTRUST Community Foundation

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