

BRAND STANDARDS MANUAL



CAPTRUST

The essence of the CAPTRUST brand is sophistication, professionalism, trust, and worth. As such, everything from placement of lines, choice of words, selection of imagery, and application of color should be done with intent and serve a specific purpose and function.

From a design perspective, the visual mood of our brand can be characterized as crisp, clean, strong, and easy to understand.

The use of high-contrasting colors, right angles, well-defined page structures, and thoughtfully organized information, while also allowing ample room for air or white space, helps us achieve this end goal.

LOGO AND BASICS

STATIONERY

PRESENTATIONS

WEBSITE AND DIGITAL DELIVERY

PROMOTIONAL ITEMS

WRITING STANDARDS

VIDEO

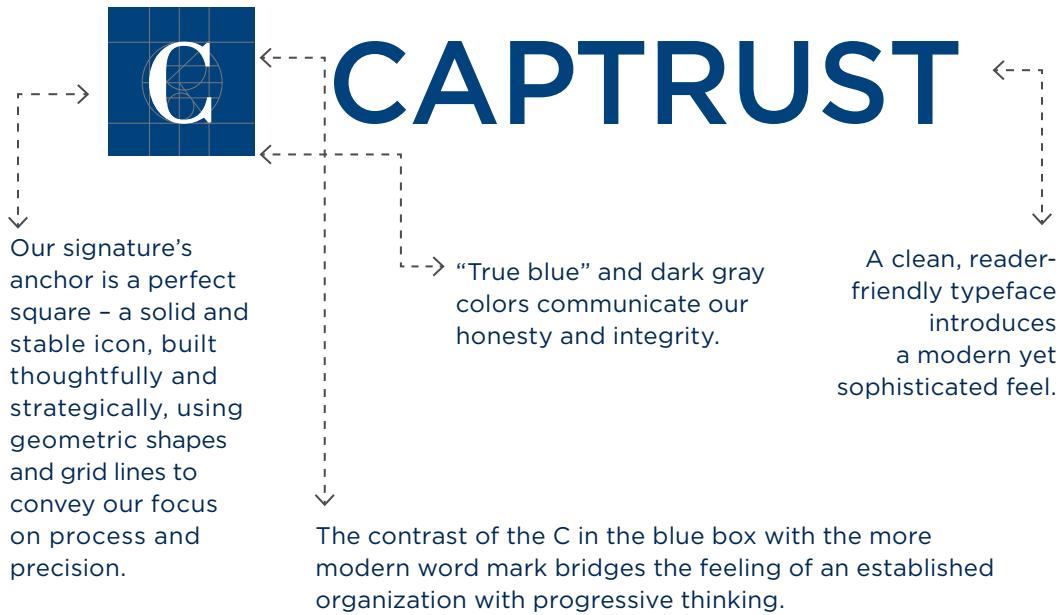
ENVIRONMENTAL DESIGN

LOGO

The CAPTRUST logo is the most literal depiction of the CAPTRUST brand available. It was created in 2006 as part of a firm-wide rebranding initiative, and we expand on the thinking and significance behind each component in its makeup.

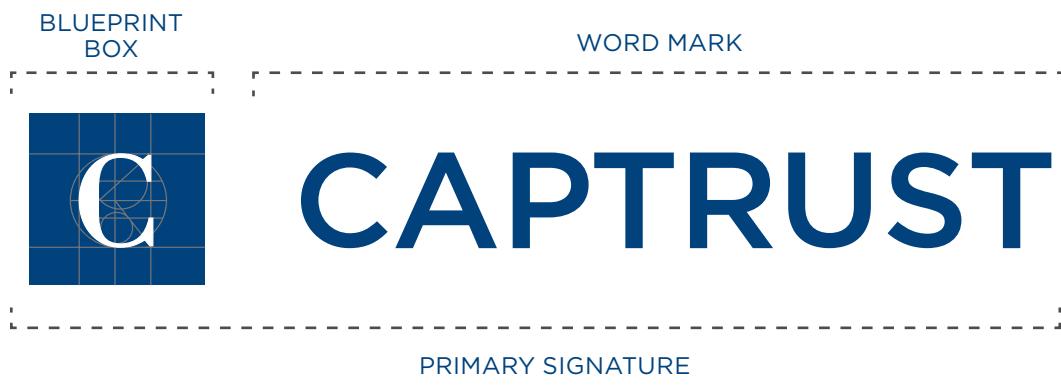
The “blueprint” mark helps tell the fundamental story of how CAPTRUST works with its clients. The subtle lines and details in the symbols convey the inner workings of our proprietary process, which makes us the independent, objective advisor of choice. Overall, the combination of tradition and modernism positions CAPTRUST now and in the future.

Do not alter, redraw, or add any additional words or graphic elements to the logo. Always use approved and provided electronic artwork. When referring to CAPTRUST in text, capitalize all letters.



It is important that the CAPTRUST logo remains consistent in all applications. Whether it is used in web, print, or promotional items, it's a visual emblem of everything we stand for — it's our signature.

PRIMARY SIGNATURE



SECONDARY STACKED SIGNATURE

Stacked configuration may be used when space does not accommodate our primary signature, shown above.

Example: Stacked signature usage.



CAPTRUST



LOGO

SIGNATURE CONFIGURATIONS AND USAGE

In certain instances, a special configuration of our signature is acceptable. Please continue to abide by our other guidelines when using these.

BLUEPRINT BOX ONLY

Sole use of the blueprint box is permitted as a design accent. However, this should not be considered a replacement for our primary signature at any time.



WORDMARK ONLY

Sole use of the wordmark is also permitted; however, this should not be considered a replacement for our primary signature at any time.

CAPTRUST

ALTERNATE SIGNATURE

Some state laws require that Financial Advisors be added to the CAPTRUST primary signature. Contact John Curry or Colby Warren in Marketing for these exceptions and usage.



CAPTRUST | Financial Advisors

MINIMUM SIZE AND WHITE SPACE REQUIREMENTS



CAPTRUST

Reducing the size of our signature reduces the clarity of the delicate line weights in our blueprint box.

The minimum size of our signatures, either horizontal or stacked orientations, is dictated by the minimum allowable width/height of the blueprint box, which is 0.5 in.

The minimum white space around the logo should be the same width of the blueprint box.

OTHER CAPTRUST LOCATIONS AND THEIR LOGOS

There are four other companies that have offices in the U.S and share the “captrust” name. They are, however, not affiliated with CapFinancial Partners, LLC.

These businesses are located in the following areas:

CapTrust Financial Advisors
Ann Arbor, Michigan



CapTrust Financial Advisors
Holland, Michigan



CapTrust Financial Advisors
Chadds Ford, Pennsylvania



A screenshot of the CapTrust Financial Advisors website. The header features the word "CAPTRUST" in a large, stylized font. Below the header is a dark banner with the word "ABOUT". The main content area contains a paragraph of text about the company's mission and values, followed by a copyright notice at the bottom.

CapTrust Financial Advisors
Holland, Michigan
www.captrustholland.com

A screenshot of the CapTrust Financial Advisors website. The header features a night-time city skyline background with the word "CapTrust" overlaid. Below the header is a navigation bar with links for "Home", "Our Team", "The CapTrust Difference", "In the Community", "Resources", and "Contact Us". The main content area contains three columns of text, each starting with a large letter (C, A, P) and describing the company's culture, services, and investment philosophy. At the bottom right is a small chart titled "DOW JONES INDUSTRIAL AVERAGE" showing historical price data.

CapTrust Financial Advisors
Ann Arbor, Michigan
www.captrustaa.com

A screenshot of the CapTrust Financial Advisors website. The header features the word "CAPTRUST" in a large, stylized font. Below the header is a dark banner with the word "HOME". The main content area contains a large image of a blossoming tree in a park-like setting. At the bottom of the page is a small paragraph of text about the company's commitment to client needs and its investment philosophy.

CapTrust Financial Advisors
Chadds Ford, Pennsylvania
www.captrustfa.com

LOGO

FOR SERVICES AND SUB BRANDS

Some services, initiatives, and entities require an additional signature within the CAPTRUST brand. These typically are wordmarks that do not dilute the CAPTRUST brand. Please contact Marketing for approval and execution of these needs.

Logos for services, initiatives, and sub brands are created when a distinct identity can be applied without altering the CAPTRUST brand. Appropriate usage is determined by Marketing and Compliance.

EXAMPLES OF SERVICES, INITIATIVES, AND SUB BRANDS

Freedom One Retirement Services (Example of Subsidiary)



CAPCommunity Foundation (Example of Logo for Internal and External Audiences)



Freedom 401k (Example of Branded Services)



One Unified Practice (Example of Internal Initiative)



REGISTERED TRADEMARKS

The name CAPTRUST Financial Advisors and our company's logo mark are officially registered with the national trademark office. The following CAPTRUST sub brands and services also use the registered trademark symbol. The first mention of the registered trademark in a document requires the circle R symbol; subsequent mentions do not.

DIRECT Fiduciary[®]

Freedom401k[®]

Freedom One[®]
Retirement Services

Provider LINK[®]

Retirement Blueprint[®]

LOGO

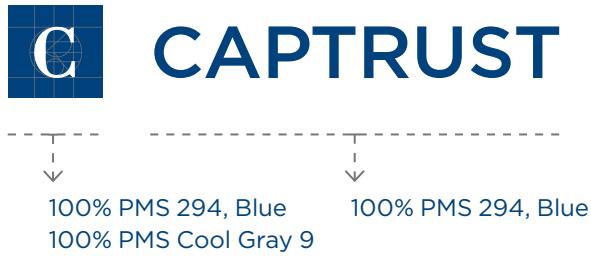
COLOR REPRODUCTION

The CAPTRUST signature consists of two distinct colors, Pantone 294 (blue) and Pantone Cool Gray 9.

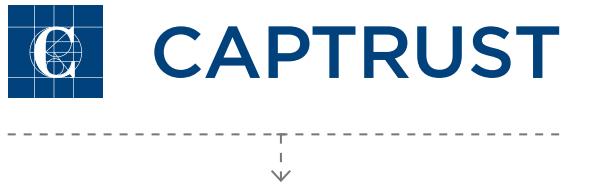
PRIMARY COLORS



PRIMARY SIGNATURE = 2-COLOR



PRIMARY SIGNATURE = 1-COLOR



When limitations allow only one color, it is preferred that 100% PMS 294, Blue, is used.

BLACK AND WHITE REPRODUCTION

Both solid black and black and white reversed signatures are available for use when production requirements limit the use of our PMS 294 blue. Some examples of black and white logo usages are gobo lighting, one color printed materials, and one color promotional items.

PRIMARY SIGNATURE = BLACK



Example of White Signature Usage



PRIMARY SIGNATURE = WHITE



LOGO

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SIGNATURE VIOLATIONS

Never surround any signature with a shape, such as a box or outline.



Never distort or alter any elements of the signature.



Never reproduce any signature on textures or backgrounds that may impair legibility.



Never reposition elements of the signature.



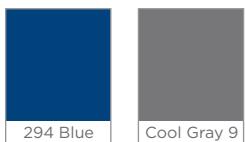
When placing our signature, be sure a white bounding box is NOT visible.



CORPORATE COLOR PALETTE

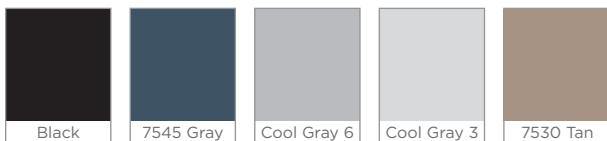
CAPTRUST has selected a specific color palette because color plays an important role in establishing a consistent corporate identity. The corporate colors below apply to all forms of CAPTRUST communications.

PRIMARY COLORS



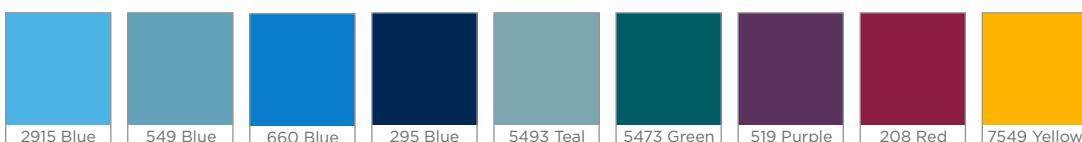
Use the primary colors for the first applications of coloration on materials.

SUPPORTING NEUTRAL PALETTE



Use the supporting neutral palette colors for additional applications of coloration including text and callouts.

SUPPORTING ACCENT PALETTE



Use the supporting accent palette colors for bars, lines, and sections of charts and graphs.

PANTONE®	CMYK	RGB	HEX
■ 294 CP	100 69 7 30	0 67 123	#00437b
■ Cool Gray 9 C	56 46 44 10	118 119 123	#7677b
■ Black	0 0 0 100	0 0 0	#000000
■ 7545 C	77 60 44 25	65 84 100	#415464
■ Cool Gray 6 C	36 29 28 0	168 168 170	# a8a8aa
■ Cool Gray 3 C	21 16 17 0	200 200 200	# c8c8c8
■ 7530 C	37 38 47 3	164 148 131	#a49483
■ 2915 C	57 14 0 0	95 180 229	#62b4e4
■ 549 C	60 24 20 0	105 163 185	#69a3b9
■ 660 C	74 44 0 0	64 126 201	#407ec9
■ 295 C	100 84 36 39	0 40 86	#002856
■ 5493 C	53 22 29 0	125 168 174	#7da8ae
■ 5473 C	91 49 19 23	3 93 103	#035d67
■ 519 C	69 89 35 24	91 50 95	#5b325f
■ 208 C	33 98 60 26	139 30 65	#8b1e41
■ 7549 C	0 22 100 0	255 182 0	#ffb600

CORPORATE FONTS

There are two categories of typefaces to consider: print and web. CAPTRUST uses a selection of display (headline and subheads) and text (body copy) typefaces. We recommend keeping all fonts above 8 pt in size and using the darker colors from our palette to help ensure legibility.

PRIMARY DISPLAY TYPEFACE: PRINT

Gotham Book

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Medium

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Medium and Book are used primarily for subheads. They can also be used for headline copy and callouts.

Gotham Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Bold may be used to add extra emphasis to text and special callouts.

Gotham Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Light has limited applications and should be used in moderation.

The italic versions of the Gotham font family are also considered acceptable for use, but only in moderation.

PRIMARY TEXT TYPEFACES: PRINT

Minion Pro Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Minion Pro Medium

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Minion Pro Semi-bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Minion Pro Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

The italic versions of the Minion Pro font family are also considered acceptable for use, but again, only in moderation.

Frank Ruhl Libre and Gotham are the typefaces used for CAPTRUST digital materials. Frank Ruhl Libre is a serif font primarily utilized for headers and small blocks of copy in larger point sizes; you can also use Montserrat, a san serif font, instead. Gotham is a san serif font used for larger blocks of copy in smaller point sizes. We recommend keeping all fonts above 8 pt in size and using the darker colors from our palette to help ensure legibility.

PRIMARY DISPLAY TYPEFACE: DIGITAL

Frank Ruhl Libre Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Frank Ruhl Libre Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Frank Ruhl Libre Bold is considered acceptable for use, but please use only in moderation.

PRIMARY DISPLAY TYPEFACE: DIGITAL

Montserrat Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Montserrat Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Montserrat Bold is considered acceptable for use, but please use only in moderation.

PRIMARY DISPLAY TYPEFACE: DIGITAL

Gotham Book

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Medium

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Medium and Book are used primarily for subheads. They can also be used for headline copy and callouts.

Gotham Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Bold may be used to add extra emphasis to text and special callouts.

Gotham Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Gotham Light has limited applications and should be used in moderation.

The italic versions of the Gotham font family are also considered acceptable for use, but only in moderation.

CORPORATE FONTS

These fonts are called system fonts, which means they will be found on any modern computer. Please use these when you are creating collateral that will be sent to external sources. Using these fonts will practically eliminate things appearing differently on other devices.

SECONDARY DISPLAY TYPEFACE: DIGITAL

Verdana Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Verdana Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Verdana Italic can be used for captions, footers, or special callouts.

Verdana Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Verdana Bold Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Verdana Bold and Bold Italic versions are considered acceptable for use, but please use only in moderation.

SECONDARY TEXT TYPEFACE: DIGITAL

Palatino Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Palatino Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Palatino Italic can be used for captions, footers, or special callouts.

Palatino Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Palatino Bold Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Palatino Bold and Bold Italic are considered acceptable for use, but please use only in moderation.

PHOTOS AND ILLUSTRATIONS

PHOTOGRAPHY STYLE

Photography included in CAPTRUST materials should be carefully selected to complement and enhance the overall visual appeal of a communication and provoke additional thought about the content it is being paired with.

Although labels are limiting, generally speaking, the images that work best with our brand and content tend to be more modern in style, feature an open and airy composition, and are inclusive of cooler tones with pops of vibrancy that coordinate well with our brand's color palette. Shown in the **MORE LIKE THIS** example to the right.

Whenever possible, avoid the reference of overly generic financial subject matter, such as clocks, currency, hands, newspapers, piggy banks, sailboats, senior citizen couples, etc., shown in the **LESS LIKE THIS** example to the right.

ILLUSTRATIONS AND DIAGRAMS

Illustrations and diagrams should be clean, contemporary, and accurate. Utilize the corporate color palette for elements of the layout.

IMPORTANT COPYRIGHT NOTICE

CAPTRUST is committed to the protection of intellectual property and copyrighted material. The illegal use of copyrighted photography, graphics, and/or illustrations is not permitted by CAPTRUST. This includes illegally downloading files from the internet or any other form of illegally acquiring or sharing copyrighted assets. Keep in mind that such acts are not only punishable by law, but also put our business and reputation at risk. If you have any questions regarding the use of our copyright policies, please contact our Marketing Department for further assistance.

MORE LIKE THIS



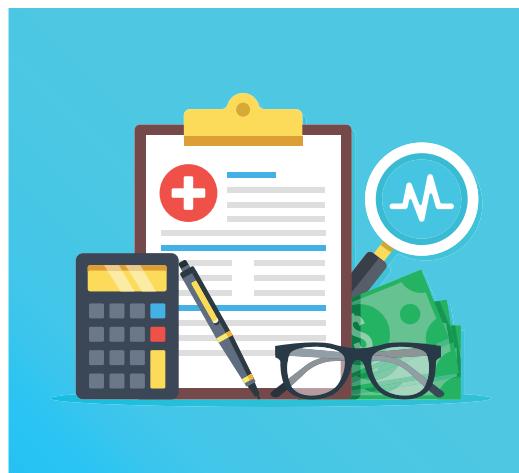
Example: Modern style, open and airy composition.

LESS LIKE THIS



Example: Overly generic and predictable.

ILLUSTRATION EXAMPLE



LOGO AND BASICS

STATIONERY

PRESENTATIONS

WEBSITE AND DIGITAL DELIVERY

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BUSINESS CARDS AND PERSONALIZED NOTE CARDS

All new employees should automatically receive business cards and personalized note cards if appropriate. See examples at right. No request for ordering is required on your part.

Should you need replenishment, please visit our company intranet, complete the reorder form found under Employee Resources (Business Card Order Form), and have your supervisor approve the request before submitting. Keep in mind that our standard turnaround time is about two weeks, so please do not wait until you run out before reordering.



ELECTRONIC STATIONERY AND TEMPLATES

Visit our company intranet, hover over Departments, and then click on Marketing. Next, towards the bottom of the page click on the tile labeled Brand Identity to access our directory of available electronic stationery and other templated resources.

The following electronic stationery and electronic templates can be found on the CAPTRUST intranet:

- Digital letterhead by location
- Memo
- Fax cover sheet
- Agenda

The path and location on the CAPTRUST intranet is:

[Home > Departments > Marketing > Brand Identity > Electronic Stationery](#)

ELECTRONIC SIGNATURES

STANDARDIZED EMAIL SIGNATURE

Our IT Department coordinates with the Marketing Department to deploy a universal email signature for each employee. It is not permitted to adjust these default settings. Please contact the IT Department if you need assistance with your signature or email settings. See format below.

Colby Warren
Manager | Marketing | Advisor Group
Colby.Warren@captrust.com

CAPTRUST | 4208 Six Forks Road, Suite 1700 | Raleigh, NC 27609
919.870.6822 | 919.870.8891 fax | 800.216.0645 toll free
captrust.com | captrustdirect.com

Our mission is to enrich the lives of our clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation.

To access important disclosures related to email, click [here](#).

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PRESENTATION MATERIALS

POWERPOINT TEMPLATES

To ensure presentations are clear and professional, all employees are required to use the defined PowerPoint templates. In addition, CAPTRUST Marketing can provide guidance on content organization, images and illustrations, and templates and formatting for other approved usages.

Please note that the use of images, particularly for external presentations, should also reflect a sophisticated, professional image. Clipart, animations, and use of protected and copyrighted materials that do not belong to CAPTRUST are not allowed.

The path and location on the CAPTRUST intranet for the corporate PowerPoint template is:

**Home > Departments > Marketing > Marketing Tools >
CAPTRUST Templates**

CORPORATE TEMPLATE



The corporate template is used for internal presentations and communications such as department meetings, speaking engagements, and lunch-and-learns.

The corporate template comes in light and dark versions with both widescreen and standard definition aspect ratios. You can determine which version to use depending on how it will be used.

DARK CORPORATE TEMPLATE



Here are some examples:

- Dark widescreen template - good for presenting in a dark room or projection.
- Light standard definition - great for presentations that you want to also print out and hand to the audience.

WEALTH PITCH TEMPLATE



PRIVATE WEALTH MANAGEMENT

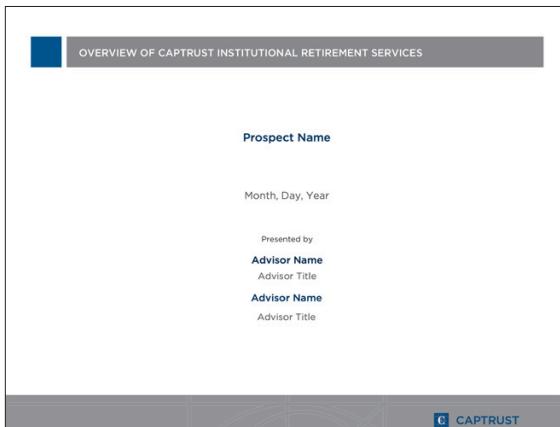
Prepared for:
Sample

2019

Prepared by:

The wealth pitch template is used for prospecting new individual opportunities including high-net-worth individuals, families, executives, business owners, professional athletes, and retirement plan participants.

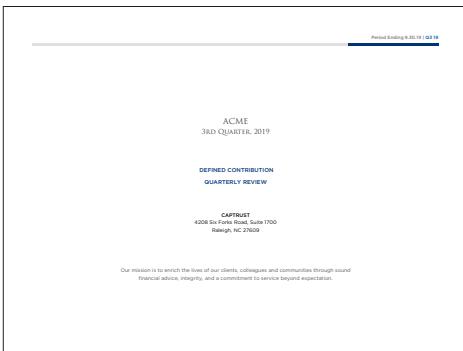
INSTITUTIONAL PITCH TEMPLATE



The institutional pitch template is used for prospecting new retirement plan clients, endowments and foundations, religious organizations, and cross-sell opportunities with existing clients.

PRESENTATION MATERIALS

QUARTERLY REPORT TEMPLATE



The quarterly report template is used for quarterly reviews with institutional clients.

PAS TEMPLATE



The PAS template is used for educational purposes in participant meetings and webinars.

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CORPORATE WEBSITES

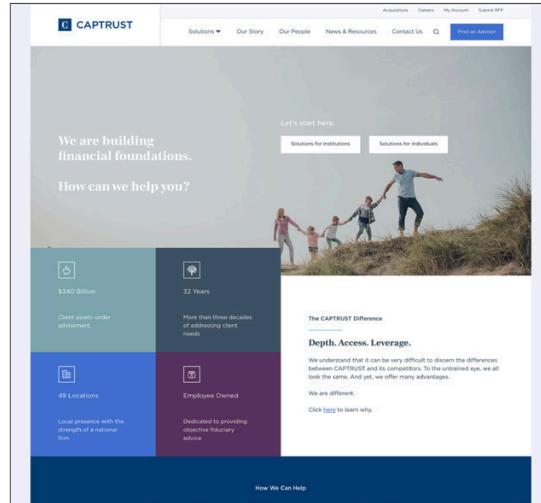
CAPTRUST WEBSITES

The websites created and maintained by CAPTRUST utilize the branding elements outlined in previous sections of the Brand Guidelines. The CAPTRUST color palette is used when building graphical elements. Frank Ruhl Libre and Gotham fonts are used for body and headline text.

The use of photography and images for websites should reflect a sophisticated, professional look. Clipart, animations, and use of protected and copyrighted materials that do not belong to CAPTRUST are not allowed.

The images to the right show layouts for three unique CAPTRUST websites. The goal is to have a distinctive website for each target audience while retaining brand elements that tie them all together. Colors, illustrations, fonts, and photography style are consistent throughout.

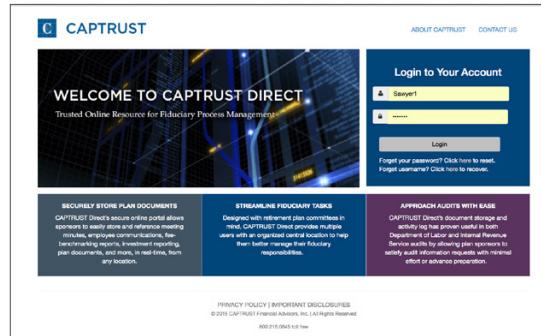
CAPTRUST HOME PAGE



PARTICIPANT ADVICE HOME PAGE



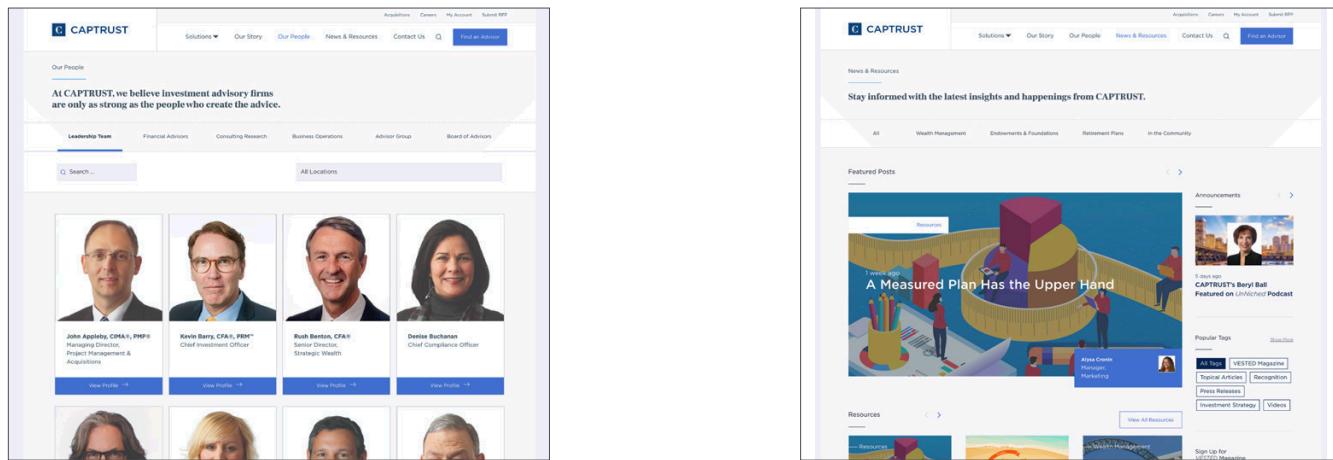
CAPTRUST DIRECT HOME PAGE



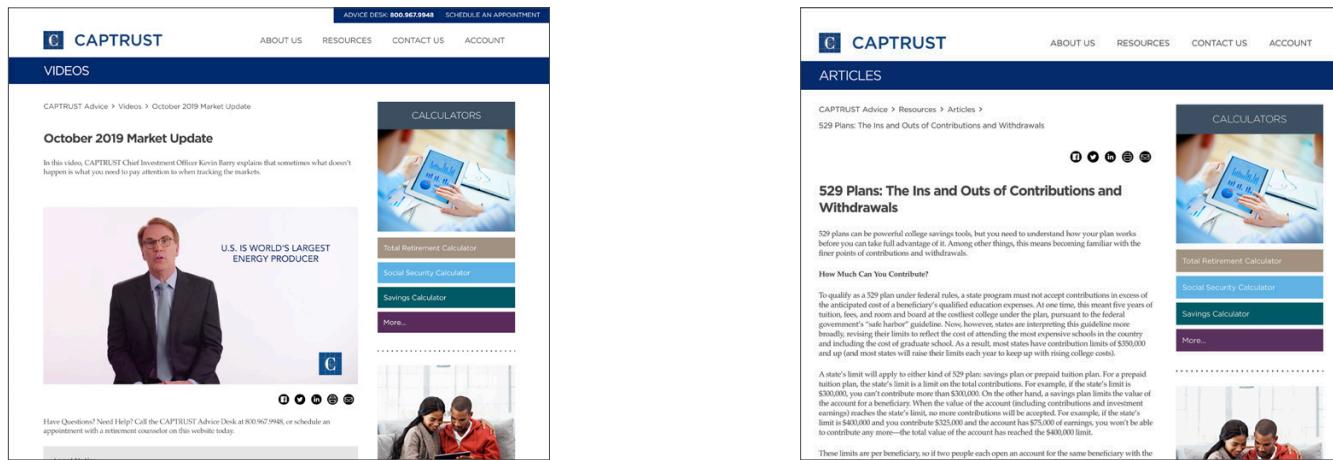
CORPORATE WEBSITES

CAPTRUST WEBSITES

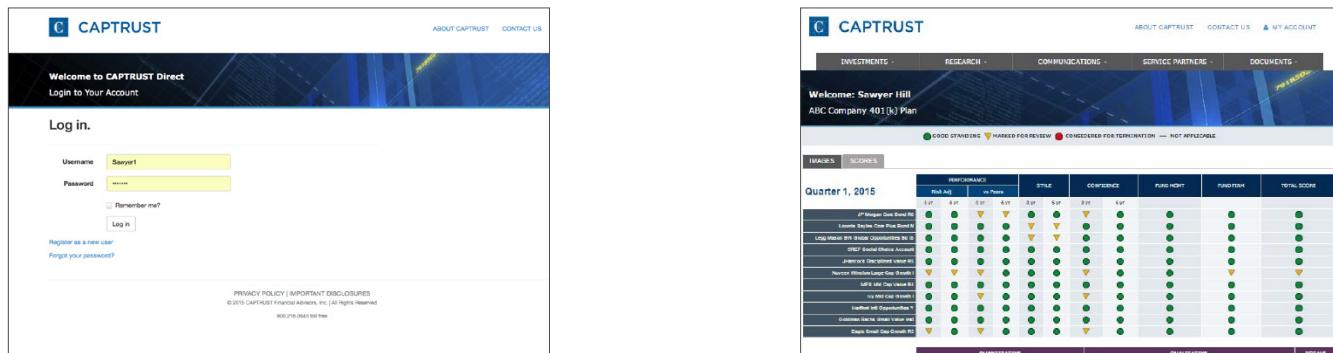
CAPTRUST INTERIOR PAGES



PARTICIPANT ADVICE INTERIOR PAGES



CAPTRUST DIRECT INTERIOR PAGES



CORPORATE WEBSITES

DIGITAL DELIVERY OPTIONS

Electronic delivery options such as e.briefs and email templates created and maintained by CAPTRUST should utilize the branding elements outlined in previous sections of the Brand Guidelines. The CAPTRUST color palette is used when building graphical elements. Verdana and Palatino fonts are used for body and headline text.

The use of photography and images for websites should reflect a sophisticated, professional look. Clipart, animations, and use of protected and copyrighted materials that do not belong to CAPTRUST are not allowed.

INSTITUTIONAL CONTENT EMAIL



C CAPTRUST

INVESTMENT STRATEGY

Diminishing Returns: The Incredible Shrinking Bond Yield

As we enter the last quarter of the year, the time is right to check out our latest edition of investment strategy. Written by Kevin Barry and Sam Kirby, it provides a down-to-earth take on the global interest rate environment, how rates got so low, what this may be telling us, and how long low rates are likely to last. Read on for the full story. [READ MORE >>](#)

CAPTRUST NEWS **FIND AN ADVISOR** **ARTICLES AND RESOURCES**

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CAPTRUST E-BRIEF



C CAPTRUST

E-BRIEF | 10.03.2019

BRICK CLIENTS

Leica Camera
Chris Kulick (Doylestown, PA) & Sean Teesdale (Raleigh, NC)
\$8 million 401(k)
Leica Camera AG is a German company that manufactures cameras, lenses, binoculars, rifle scopes, microscopes, and ophthalmic lenses. The company was founded by Ernst Leitz in 1914.

500 2020 **295** NET NEW BRICKS **59%** OF GOAL ATTAINED **3,713** TOTAL FIRM BRICKS TO DATE

BRICK BONUS PROGRAM PROGRESS UPDATE

New Wealth Client for **Paul Stibich** (Akron, OH) & **Nathan Bopp** (Green, OH)
Amount of Relationship - \$1.5 million
This new wealth client was a sales executive for an institutional client of the Akron team, making this a bridge win. His employer was recently acquired, and he was being paid out on his ESOP, prompting him to look for an advisor. He had met with a few other advisory firms but ultimately decided to hire CAPTRUST. He made the decision to hire CAPTRUST based on the trust established from the institutional relationship.

New Wealth Client for **Paul Stibich** (Akron, OH) & **Nathan Bopp** (Green, OH)
Amount of Relationship - \$4.5 million
This new wealth client and her husband are grandparents who received an inheritance from a relative who passed away. They were referred to CAPTRUST via their grandson, who's a close friend of Paul. They were looking for an advisor to help with tax planning and setting up accounts for their grandchildren and great-grandchildren with the inheritance. Paul teamed up with Nathan to meet with her and share ideas on how CAPTRUST could assist her meeting her goals. She made the decision to hire CAPTRUST due to our expertise in tax planning, establishing trusts, and the ability to create a plan that would meet her needs.

PAS MONTHLY EMAIL



C CAPTRUST

ROTH SAVINGS

YOUR CONTRIBUTION TAX FREE AT RETIREMENT **EMPLOYER CONTRIBUTION** TAXABLE AT RETIREMENT



The Roth Feature
Imagine having the flexibility to enhance your retirement savings with an additional tax-advantaged account. In this video, Brandon Aber explains the details surrounding the Roth feature. This tool allows you to save for retirement by paying income tax on current contributions letting them grow tax free.

[CLICK HERE TO WATCH >>](#)

Ask the Experts
Our experts discuss early retirement package offers, the difference between value and growth investing, and how to get rid of those annoying telemarketer calls.

[READ MORE >>](#)

Featured Articles and Resources

- [Safe Travels](#)
- [Umbrella Liability Insurance](#)
- [The Fuzzy Math of Social Security](#)

[FIND MORE ARTICLES](#)

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COMPANY STORE

CAPTRUST warehouses and distributes a wide range of premium promotional products approved and selected by the Marketing Department for general purchase and use.

Our ecommerce site is password protected and available strictly for internal use.

To visit the company store:

Navigate to the CAPTRUST intranet's home page. Click on Company Store located under Resources. Enter the password: **pass2capshop**

Newly Added Items!

Check out the New Items! page at the company store for information on the latest products available.

CAPTRUST PROMOTIONAL ITEMS



COMPANY STORE WEBSITE

A screenshot of the CAPTRUST Online Company Store website. The top navigation bar includes links for 'Search', 'Policies', and 'Cart (0 Items)'. The main header says 'CAPTRUST' with a small icon. Below it is a sub-header 'CAPTRUST ONLINE COMPANY STORE'. A welcome message and shipping information are displayed. To the right is a sidebar with a shopping cart icon and links for 'Shop Search', 'You have 0 items in your cart', 'Men's Apparel', 'Women's Apparel', 'Headwear', 'Non Apparel', 'Giveaways', 'Capification', 'View All', and 'Policies & Store Information'. The main content area shows a 4x3 grid of product thumbnails. Each item has a small image, the name, and the price. For example, there's a 'Leather Business Card Case' for \$7.76, a 'Private Eyes™ Combo Lens Cover' for \$4.45, a 'Men's Cutl & Buck Forge Pencil Sharpener' for \$6.00, a 'Thunder Shopping Tote' for \$1.20, a 'Round Street Recycler Unit Pack' for \$6.00, a '48" Invention Auto Open Umbrella w/ C-Shape Handle' for \$36.00, a 'PopSockets Phone Grip' for \$1.95, a '20 oz Plastic Cup' for \$1.69, a 'Peter Millar Ladies 1/4 Zip Tony Pullover' for \$60.00, and a 'Peter Millar Men's 1/4 Zip Pullover' for \$60.00.

CUSTOM ORDERS AND SPECIAL REQUESTS

Please contact the Marketing Department with as much lead time as possible for assistance with requests for new, custom, or bulk promotional item ordering needs. This includes team jerseys and event gear, themed giveaways, any new merchandise ideas, and projects that require custom artwork designs. To ensure a timely delivery date, this process often requires a one-month lead time or more.

If you have any questions regarding our promotional resources, please contact our Marketing Department at marketing@captrust.com for assistance.



LOGO AND BASICS

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VOICE AND TONE

CAPTRUST's tone for written materials is confident and sophisticated, yet consultative and approachable. We are not intimidating or egotistical. Our conversations are evidence-based and focused on the undeniable facts we have gathered through our experience. We routinely seek to challenge the status quo, and, although we often speak emphatically, we are careful not to deliver our messages in a disturbing manner.

From a writing perspective, our voice, similar to our visual mood, can be characterized as crisp, informative, bold, and easy to understand. The CAPTRUST voice makes every word count, establishes consistency across our channels and bodies of work, and helps grab our readers' attention and establish a relationship with them.

GOALS

Our goal when writing is to make the complex simple. With this in mind, we strive to filter out unnecessary distractions and aim to provide our clients with concise, actionable advice every step of the way. We remain mindful of our intended audiences' perceived level of understanding and seek to avoid technical language whenever possible, streamline concepts, and present information according to hierarchy of importance.

Eighty percent of our editing needs can be resolved by using simple and concise writing that utilizes basic grammatical and punctuation guidelines outlined over the next few pages.

CAPTRUST WRITING STYLE GUIDE

ACTIVE VOICE

While passive voice is necessary—even unavoidable—from time to time, CAPTRUST prefers active voice. Active voice imparts a sense of clarity and purpose to writing. This is especially helpful for the kind of writing we do since it is our intent to demonstrate our expertise. Too much passive voice comes across as vague and uncertain.

Examples:

The tobacco company committee was found by the Supreme Court to have been procedurally imprudent in making its decision. **(passive)**

The Supreme Court found that the tobacco company committee acted imprudently in making its decision. **(active)**

CAPTRUST WRITING STYLE GUIDE

CAPITALIZATION

Unnecessary capitalization slows the reader down and distracts the eye. We focus our capitalization in places where it imparts meaning or importance.

TERMS OF ART

Many industry terms seem like proper nouns but are really just descriptive. Unless it is a genuine proper noun, we do not capitalize.

Examples:

Terms of art (not capitalized):

- large-cap stocks
- plan sponsor and plan participant
- qualified default investment alternative
- investment committee
- gross domestic product
- discretionary investment management

Proper nouns (capitalized):

- S&P 500 Index
- U.S. Court of Appeals
- Supreme Court
- Treasury
- Federal Reserve
- Internal Revenue Service

TITLES VS. DESCRIPTORS

Often, what looks like a title is really just a description of someone's role. We capitalize titles, but not descriptors. If it comes before the person's name, it's probably a title; if it comes after, it's a descriptor.

Examples:

CAPTRUST Chief Executive Officer Fielding Miller believes we will experience a low-return environment for the next five to seven years.

(title is capitalized)

Fielding Miller, CAPTRUST's chief executive officer, believes we will experience a low-return environment for the next five to seven years.

(descriptor is not capitalized)

DEFINED TERMS

Some of the words and phrases we use are defined terms in one context and descriptive in another. For example, Plan Sponsor, Plan, and Participant should be capitalized in summary plan descriptions or plan documents, but they should not be capitalized in more general, descriptive writing.

ADVERBS

While they are sometimes needed, adverbs can dilute the meaning of a verb and are often redundant. Next time you see an adverb, check to see if it's really adding value.

Examples:

If an adverb is not appropriately adding value to your sentence, you should swiftly delete it. (**two dilutive adverbs**)

If an adverb is not adding value to your sentence, you should delete it. (**no adverbs**)

SENTENCE LENGTHS

Given the nature of the topics we write about, we often find ourselves writing long sentences. The length of these sentences can be further complicated by clarifying clauses, parenthetical statements, examples, and the conjoining of corollary ideas. The result can be a word puzzle left to the reader to solve.

Once you've gotten the idea out of your head and onto the page, prune it. Can you turn one long sentence into two (or more!) short and easy-to-digest sentences? Are all those words really needed to make your point—or are they detracting from it?

Long sentences are sometimes needed to clear an idea. If that is the case, give your reader a break with the next sentence, and punch your meaning home with a short sentence to summarize. Varying sentence lengths keeps the reader engaged.

CAPTRUST WRITING STYLE GUIDE

GRAB BAG

What follows is a list of standards that addresses commonly found issues for those writing in the CAPTRUST style:

SPACES

We use one space between the period at the end of a sentence and the beginning of the next.

OXFORD COMMA

We utilize the Oxford (or serial) comma. That's the final comma in a list of things.

Example:

The dollar, yen, and pound all gained on news of the Fed's interest rate hike. **(Oxford comma)**

The dollar, yen and pound all gained on news of the Fed's interest rate hike. **(no Oxford comma)**

CURRENCIES

Currency names are not capitalized. A currency is considered to be a unit of measure—like an inch, a meter, or a kilogram—and is, therefore, not capitalized.

QUOTES

Quotation marks are meant to denote quotes—or words said by someone else. Figures of speech, technical terms, and terms of art do not require quotes. It is, however, our convention to italicize terms of art when they are being introduced (and only the first instance).

Example:

They are the building blocks for all other asset prices, with U.S. Treasury bonds crowned as the vaunted “risk-free rate.”

(incorrect)

They are the building blocks for all other asset prices, with U.S. Treasury bonds crowned as the vaunted *risk-free rate*.

(correct)

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VIDEO GUIDELINES

Videos are an extension of the CAPTRUST brand and should adhere to the same standards as other media. They should be tight, timely, informative, and applicable to the intended audience. We use video both internally and externally. Regardless, we aim for a high-quality production value and strong story telling. When considering video as a message delivery device, it is important to know the end audience, their understanding of our brand, and the intent of the deliverable.

Our content is delivered by CAPTRUST employees who are subject matter experts, comfortable and confident on camera, and deliver concise messaging in non-technical terms. Videos are typically 30 seconds to three minutes; this is to keep engagement high.

Contact Marketing to start the video conversation at marketing@captrust.com.

Below are some samples of videos we have created for clients, prospects, and colleagues.

MARKET UPDATE



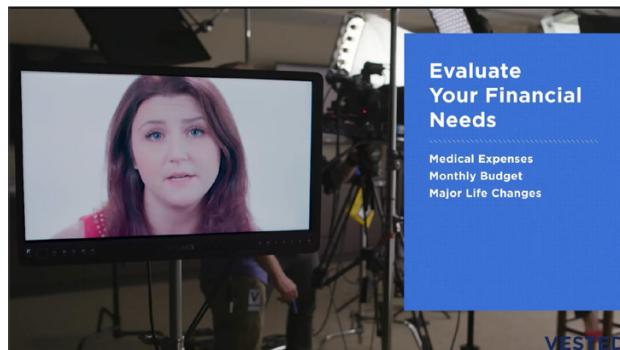
BUSINESS LINE COMMERCIAL



AKRON OFFICE MARKETING



VESTED VIDEO



GFX EXAMPLES:



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ENVIRONMENTAL DESIGN

ENVIRONMENTAL DESIGN

ENVIRONMENT DESIGN GUIDELINES

Office environments are an extension of the CAPTRUST brand and therefore should present a consistent look of elegance and style.

Decor, art, photography, and furniture should be cohesive and high quality. The environment should feel inclusive and appeal to both the traditional and the contemporary eye. Mahogany, frosted glass, metal accents, clean lines and ornate decoration live in harmony through our color palette and materials below:

Material	Manufacturer	Product #	Color #	Notes
Carpet Option 1	Bentley	Salt Creek Tile	Cargo Culture 402026	
Carpet Option 2	Shaw	District, Intent Tile 5T208	Skylight 08530	
Luxury Vinyl Tile	Karndean	Vangogh	Smoked Beech VGW98T	
Vinyl Composite Tile	Armstrong		Classic White	12X12
Vinyl Base	Johnsonite		TB1 Peppercorn	4" Cove base
Linoleum	Forbo	Marmoleum Fresco	Walnut 3874	
Paint	Benjamin Moore		Carrington Beige HC-93	Field paint (eggshell)
Paint	Benjamin Moore		Brittany Blue 1633	Accent paint (eggshell)
Paint	Benjamin Moore		Spanish White OC-35	Door frame, trim paint (semi-gloss)
Plastic Laminate	Wilsonart	Standard laminate	Rustic Slate 4888-38	
Plastic Laminate	Wilsonart	Premium Laminate	Phantom Ecru 8212-K-28	
Solid Surface	Cambria		New Quay	



CARPET OPTION 1



PAINT OPTIONS



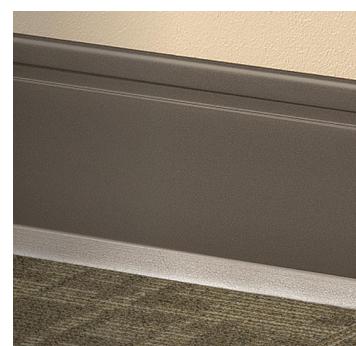
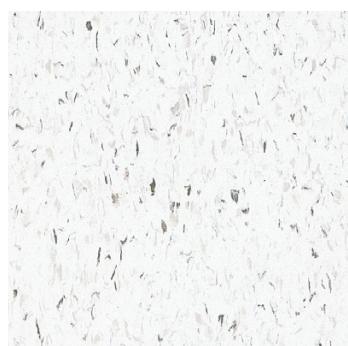
CARPET OPTION 2



PLASTIC LAMINATE



LUXURY VINYL TILE



VINYL COMPOSITE AND BASE

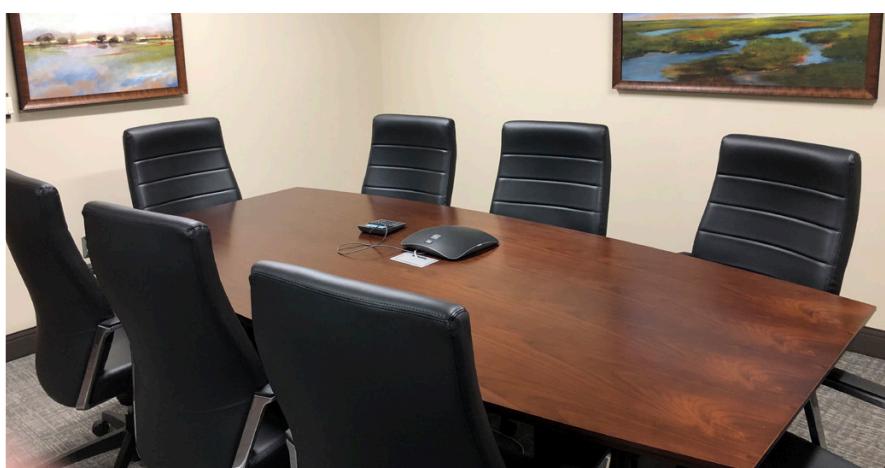
INTERIOR DESIGN

SAMPLES FROM RALEIGH AND OTHER OFFICES

Raleigh, NC



Lynchburg, VA



Charlotte, NC



EXTERIOR OFFICE EXAMPLES:

Allentown, PA



**HEADQUARTERS**

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