





Marketing


Frequently Used Resources

 Brand Identity


 Content Resource Library


 Headshots


 Marketing Tools


 Quarterly Resources


Business Development Team and Resources

 About Us

 Advisor Request for Proposal (RFP) Resources

 Communication and Resources

 Proposal Lookbook Library

 Sales Support Request Tool



Brand Marketing Team's Organization

Strategic Marketing Initiative



Use of Video: CAPTRUST Studio and Allego



VESTED Magazine

The marketing team ensures a consistent, high-quality experience for all internal and external engagements with CAPTRUST. Our areas of focus include brand standards, editorial, collateral, client marketing, quarterly items, business development, campaigning, social media, media relations, event support, and strategic initiatives. High level overviews of each are available by clicking [here](#).

Business Development Support and Sales Enablement


CAPTRUST maintains an internal business development and sales enablement team which supports financial advisors with the assessment, development, and appropriate engagement of business development opportunities through internal resources and coordination, market intelligence, and historical data and trends to ensure a successful outcome.

Brand Marketing

Brand marketing creates, promotes, and supports a wide range of elements aimed at delivering a consistent and exceptional experience across all aspects of a person's interaction with CAPTRUST. This marketing arm includes four bodies of work—corporate marketing, digital marketing, editorial and public relations, and strategic marketing—responsible for editorial strategy, digital marketing, video production, email marketing, event support, lead generation, quarter-end materials.

Strategic Marketing

The Strategic Marketing team is responsible for incubating new ideas and leading initiatives to help keep the firm ahead of the registered investment advisor curve. This includes exploring new marketing tools, technologies, and techniques intended to build our brand and bring in new clients. This team is also in charge of planning and budgeting to make sure that marketing resources and budget keep up with the firm’s growth.

 [Intranet Editor Training Site](#)

Quick Links



[Acronym and Terminology Guide 2020](#)



[Brand Standards Manual](#)



[CAPTRUST At a Glance Q4 2022](#)



[Sales Support Request Tool Overview](#)



[Sales Support Request \(SSR\) Overview](#)



[Social Media Guide 2023](#)



[Writing Style Guide 2023](#)

News



2023 Writing Style Guide | Tips and Updates

Here is the updated, 2023 edition of the CAPTRUST Writing Style Guide. This document is also available on the marketing department site under Quick Downloads. This year, we've added clarity around some common terms (such as target-date fund, ultra-h...
