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MEET THE TEAM

Jason Stanicek, CRPS®

Principal, Financial Advisor

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Jason Stanicek is an institutional retirement plan advisor based in Raleigh, NC.

Jason joined CAPTRUST in 2006 as principal, financial advisor and is responsible for providing retirement plan advisory services to corporate fiduciaries. Prior to joining the firm, Jason served as a regional vice president with Lincoln Financial Group's institutional retirement plan division and has worked in the industry since 2000. Jason graduated from the University of North Carolina at Chapel Hill where he earned a Bachelor of Arts degree in communication studies and was the quarterback and captain of the Tarheel football team. Jason holds the Certified Retirement Services Professional (CRPS) designation. Jason was a recipient of CAPTRUST's Rainmaker Award in 2007, 2008, 2009, and 2014. He also won Advisor of the Year in 2014.

Danny Lowe, MBA, RFC®

Senior Financial Advisor

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Danny Lowe is an institutional retirement plan advisor based in Raleigh, NC.

Danny joined CAPTRUST in 2013 and serves as a senior financial advisor responsible for providing retirement plan advisory services to corporate fiduciaries. Prior to joining the firm, Danny worked as a senior executive benefits consultant with Principal Financial Group. Danny graduated from UNC Chapel Hill with a Bachelor of Arts in Management and Society, and earned a Masters in Business Administration from East Carolina University. Danny has worked in the industry for more than 20 years.

Please go to https://www.captrust.com/wp-content/uploads/2019/09/Professional-Certification-Designations.pdf to review an explanation of professional designations referred to or included in this presentation.

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Sonya Glenn, MBA
Client Relationship Manager

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Sonya Glenn is an institutional client relationship manager based in Raleigh, NC.

Sonya joined CAPTRUST in 2014 as a client relationship manager supporting our client service efforts on the institutional service team. Prior to joining the firm, Sonya served as a lead retirement plan coordinator for T. Rowe Price Retirement Plan Services, providing day to day management large, complex retirement plan clients. She graduated magna cum laude from the University of Maryland University College with a Bachelor of Science in Social Sciences and earned a Master of Business Administration degree from Liberty University. Sonya holds the FINRA Series 6 and 63 licenses. She was the recipient of a CAPTRUST Client Service Award in 2020, and has worked in the industry since 2000

Rob Thomas, CIMA®
Senior Consultant, Investments

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Rob Thomas is a senior consultant based in Chicago, IL.

Rob joined CAPTRUST in 2021 and serves as a Senior Consultant of Investments. Since joining CAPTRUST, Rob has worked with our clients in the higher education and arts and cultural industries amongst others. Rob currently holds the Series 7 and 66 and is a member of the Investments and Wealth Institute. He also holds the Chartered Institute of Management Accounts (CIMA) designation.

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Catherine Mitchell, MBA

Account Manager, Wellness and Advice Strategies

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Catherine Mitchell is an account manager based in Raleigh, NC.

Catherine joined CAPTRUST in 2019. As a CAPTRUST Account Manager, she is responsible for assisting clients with communication and education planning as part of their CAPTRUST advice and wellness program. Prior to joining the firm, Catherine served as a financial advisor from 2013-2019 where she assisted clients with comprehensive financial and retirement planning. Catherine obtained her undergraduate degree from the University of North Carolina at Chapel Hill where she majored in International Studies and Spanish. She completed the Kenan-Flagler Business Essentials Program shortly after graduation and went on to obtain her master's in business administration from North Carolina State University.

Brandon Aber, CFP®

Financial Advisor

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Brandon Aber is a financial advisor based in Raleigh, NC.

Brandon joined CAPTRUST in 2012 and serves as a financial advisor responsible for providing investment advisory services, financial planning, and comprehensive wealth management services to high-net-worth individuals, families, and business owners. He earned a Bachelor of Science degree in business administration from the University of North Carolina at Wilmington, and a Master of Business Administration from East Carolina University.

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Dawn McPherson, QPFC®

Director, Retirement Plan Consulting
Plan Design

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Dawn McPherson is a director of retirement plan consulting based in Kansas City, MO.

Dawn joined CAPTRUST in 2022, and is responsible for the development of consulting services to address the needs of CAPTRUST's clients. She oversees CAPTRUST's ERISA and non-ERISA technical support teams as well as retirement industry trends and initiatives. Previously, she served as a director of the retirement division of Mariner Wealth Advisors. She holds a Bachelor of Arts degree in humanities from Bob Jones University. Dawn holds the Certified Behavior Financial Analyst and Qualified Plan Financial Consultant designations.

Katie Securcher

Manager II, Nonqualified Executive Benefits

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Katie is a manager of nonqualified plan services based in Raleigh, NC.

Katie joined CAPTRUST in 2022 and is currently a specialist of nonqualified executive benefits responsible for advisor support, client management, and prospect analysis within the nonqualified retirement plan business. Prior to joining the firm, Katie worked in the Retirement Services industry for 25 years, and spent the last 15 years working in the nonqualified recordkeeping space. Katie received a Bachelor of Science in Elementary Education with a minor in history from the University of Delaware.

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Kevin Fieldman

Investment Strategist, Consulting Research Group

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Kevin is an investment strategist based in Chicago, IL.

Kevin joined CAPTRUST in 2015 and is currently and investment strategist, responsible for the oversight of asset allocation. Prior to joining the firm, Kevin served as a director with Transamerica Retirement Solutions, and he has worked in the industry since 1991. He received a Bachelor of Science degree in financial planning and counseling from Purdue University and a Master of Business Administration degree in marketing from St. Xavier University.