



2020

CAPTRUST WOMEN'S
INITIATIVE YEARBOOK

Our mission is to enhance the overall mission of CAPTRUST through creating a diverse community of advisors focused on mentoring, encouraging, and collaborating (in an effort to recruit, retain and lift up female advisors).

2020 ANNUAL MEETING AGENDA

- 2:00 – 2:15 Welcome
- 2:15 – 3:00 Panel Discussion
- 3:00 – 3:45 Small Groups Discussion
- 3:45 – 4:00 Feedback & Closing Remarks

GOALS

1. Grow our female advisor numbers
2. Lift up our newer female advisors
3. Award/recognize the contributions of those female advisors who have done great things
4. Model CAPTRUST community (challenge group to help grow and enhance community).

AUDIENCE

Female Financial Advisors and Female Financial Advisor Relationship Managers

MEETINGS

- Group will meet at least annually as part of Advisor Kickoff meeting in Raleigh
- Quarterly conference calls throughout the year to focus on specific topics/ideas

STEERING COMMITTEE

Jean Duffy, Beryl Ball, Ellen Crowley, Cathy Seeber

OUR GROWTH

- 1.1.10 – 5 out of 37 advisors = **13%**
- 1.1.15 – 10 out of 71 advisors = **14%**
- 1.1.18 – 22 out of 140 advisors – **16%**
- 1.1.19 – 30 out of 172 advisors – **17%**
- 1.1.20 – 60 out of 232 advisors = **26%**. (This is an increase of **63%** since we rolled out the initiative.)



43 LOCATIONS NATIONWIDE

- | | | | | |
|----------------|---------------------|------------------|---------------------|-------------------|
| AKRON, OH | COLLEGE STATION, TX | GREENWICH, CT | MINNEAPOLIS, MN | ROANOKE, VA |
| ALLENTOWN, PA | COLUMBIA, MO | HARRISONBURG, VA | NEW YORK, NY | SALT LAKE CITY |
| ATLANTA, GA | CORPUS CHRISTI, TX | HOLLYWOOD, FL | ORLANDO, FL | SAN ANTONIO, TX |
| AUSTIN, TX | DALLAS, TX | HOUSTON, TX | DOYLESTOWN, PA | SAN RAMON, CA |
| BETHLEHEM, PA | DAYTON, OH | JACKSON, MS | PORT WASHINGTON, NY | SANTA BARBARA, CA |
| BIRMINGHAM, AL | DES MOINES, IA | LAKE SUCCESS, NY | PORTLAND, ME | TAMPA, FL |
| BOSTON, MA | DETROIT, MI | LEXINGTON, VA | RALEIGH, NC | WILMINGTON, DE |
| CHARLOTTE, NC | GREEN, OH | LOS ANGELES, CA | RICHMOND, VA | |
| CINCINNATI, OH | GREENSBORO, NC | LYNCHBURG, VA | RIVERSIDE, CA | |



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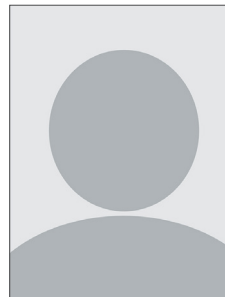


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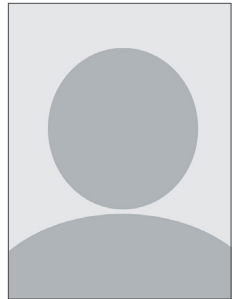


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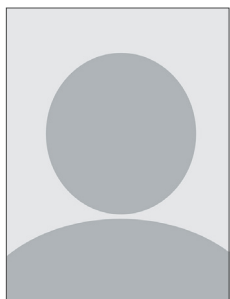


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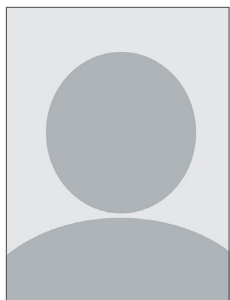
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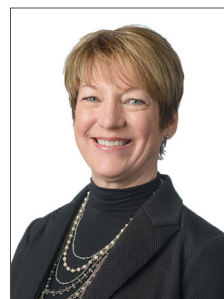


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