

*Please note: This is a transcription so there may be slight grammatical errors.*

Karen Denise:

CAPTRUST has always had a history of giving back to the communities. And one of the things that impressed me when I first interviewed with Fielding was just his commitment individually to talking about working with different charities and to ensure as a company we were fulfilling our mission statement, which included a commitment to our communities. Fast forward to 2007, that's when we applied for and received 501(3)(c) status and that's how the foundation got started.

Philip D'Unger:

The CAPTRUST Community Foundation is very interesting from the fact that it's a 100% employee run. Everyone that's on the board, everyone that volunteers on a committee is a CAPTRUST employee, so anyone can have an impact.

Nick DeCenso:

I've been involved with CCF since I started at CAPTRUST. I have always enjoyed working with kids. I had started my family at that time and I think the mission to support children in our communities really resonated with me. I was a camp counselor and came naturally to want to get involved/

Kevin Monroe:

Above and beyond your paid time off, your PTO we get community service hours. Every employee gets community service hours where they can say, I'm going to do this and I'll be gone for the whole day, and you get paid for it. And so it gives you an opportunity to say, if I'm not involved in something, what should I be getting involved into? Every employee is urged to get out in the community and do something not just with your dollars but with your time and to put some time and effort into helping someone. If it's not just a children's charity, just whoever you can get involved with, it's very much encouraged here at CAPTRUST.

Tiffany Larew:

The level of participation for colleagues is awesome. We touched so many people, not just here in Raleigh, but across the regional office as well. It's been great to see the events with the Bond Brothers 5K, be able to see some of the initiatives that each office has been passionate about, that they've continued to work in their communities. And so that's been really great to see that stretch across so many different offices and so many different leaders.

Philip D'Unger:

The CAPTRUST Community Foundation has a lot of different grant recipients and there's different levels of partnership that we do with them. Our charity of choice is our main grant recipient for the year, and we really focus on partnering with them throughout the year. We're not just looking to give funds just to give funds. We're looking to really make an impact of what can CAPTRUST employees do with the organization in addition to the grant dollars.

James Stenstrom:

In addition to supporting children in our communities, one of the other things that we do is crisis grants. So when there's a natural disaster, when there's something that's tremendously impactful to a

geographic region, we're able to respond and say, We're aware. We're trying to do what we can to help. As I go out and volunteer and see the work that we're supporting these organizations to do, it really creates a whole new perspective in terms of being there as a funder for these organizations. And then also volunteering and having boots on the ground and making an impact.

David Wahlen:

Throughout the year, CCF will run or partner with a number of events. There's the advisor kickoff fun run. There's the Pancake Breakfasts, there's the Lunch and Learns, there's the 5K, there's the silent auction. And the great thing about all these events throughout the year is they may not support the same charity, but they're all supporting or enriching the lives of children across the country.

Nick DeCenso:

For new colleagues, I love to highlight the matching program that we have where every dollar donated via payroll deduction by an employee gets matched by CAPTRUST dollar for dollar. That to me is evidence of the commitment that the company has to giving back.

Karen Denise:

Back in 2006, we had this humble goal of donating over \$5,000. So to see that in 2020 we gave over a million dollars to charities is just mind boggling.

James Stenstrom:

One of the things that often happens when we deliver a check is that a non-profit thanks us and I always turn that around and thank them. It's easy for us to show up one day a year with a check and take pictures, but they're the ones out there in the community doing hard work to make a positive impact in the lives of children that nobody else is going to see. They're the ones that we should be thinking.

Kevin Monroe:

Whether it's given money, whether it's given our time, we want to make that as important as we can, and it's one of the hallmarks for financial advisors on down at CAPTRUST is to make sure that the community around us feels CAPTRUST impact, that they know our name, not just because we're doing good things financially, but that we're doing things in the community to help others. And I think we've done a great job of that thus far, but there's so much more we can do.

Yes

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