

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

Jean Duffy:

I think the challenges that women faced in the industry historically around we didn't have any great role models to follow. We didn't really know what the opportunity that existed inside the financial services industry.

Beryl Ball:

Traditionally, this field has had very few women, and so as women are looking at possible careers, it tends not to be the one they thought about.

Fielding Miller:

We had the same issue as the industry. It was highly male-dominated, and so we opened up what we call the Women's Initiative. And the idea there has been to have our women advisors, who are highly successful, go out and find their peers and various people in their markets and recruit people to the firm.

Jean Duffy:

Our True North for the women's initiative is to grow our female advisor force and lift up those that we already have. So when you made that initiative real, we had accountability to it and we were going to make it happen.

Heidi Spencer:

I don't know of any other firms that are offering this opportunity to women to collaborate a women's initiative specifically focused on encouraging, supporting, recruiting, retaining women as a whole, and offering them this opportunity to gather together and share ideas.

Tiffany Walker:

The Women's Initiative is a community. It's a community of female advisors who are at various points in their career. They may have a different focus as far as the types of clients that they work with, but at the end of the day, we're here to support each other.

Fielding Miller:

We built the firm on various core tenants or strategies, and a very important one, and a very successful one, has been this notion of having one unified practice, or what we refer to as one-up. And the idea there is to get all of our advisors working together, synergistically heading in the same direction, each helping each other.

Erica Blomgren:

When you come in the door, you know you're going in to the best firm. But also I think the culture is the main thing that is my driver, my motivator, my inspiration every day, and not just the culture from the advisor for us, the culture of the firm.

Che-Che McCrimmon:

CAPTRUST as a firm is just a big family. We all support each other. We all have the same goal in mind. We're here to take care of each other, here to take care of the client, here to ensure that everyone's succeed.

Wilson Hoyle:

We've got to create these opportunities that will attract them to CAPTRUST. And then once they're here, we've got to figure out a way to groom them and develop them to be as successful as every other advisor's been here at CAPTRUST.

Jean Duffy:

We're going to become, as a unit, more collaborative, more encouraging, and just really continue to grow our numbers. I think it'll make CAPTRUST a better place.

Abigail Russell:

Success for the Women's Initiative is that women are calling CAPTRUST, wanting to join CAPTRUST because they know that this is a place where they will be supported, where they will grow, they will be successful, they will be celebrated for their contributions, and they will be part of this very unique culture that we have.

Fielding Miller:

When we started the firm, I was in my mid-thirties, I had two little girls. And when I looked at them, I thought, you know what? I don't want anything, hold them back. I don't want there to be any glass ceilings, I don't want there to be any bias, and I can't control what happens in the world, but I can have great influence on what happens at CAPTRUST. And I can assure you, there's nothing in your way as a female advisor to be highly successful at CAPTRUST.

Jean Duffy:

I think the real impact of the Women's Initiative is making a difference in people's lives. And they think that starts at CAPTRUST within the walls of CAPTRUST, making a difference in the lives of the female advisors that we're going to bring on board, making a difference in the lives of the female advisors that are already here and lifting them up. And then that's a domino effect. We're going to take that out to the world and we're going to make a difference in the world.

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