



## The CAPTRUST Community Foundation Announces \$1.6 Million in Donations for 2024

RALEIGH, NC – January 22, 2025 – [The CAPTRUST Community Foundation](#) (CCF), a CAPTRUST employee-run 501(c)(3) organization, announced today a record \$1,648,000 in donations for 2024. CCF also unveiled its new board members and oversight committee for 2025.

The CCF provides grants that benefit children to nonprofits across the country. In 2024, CCF supported 205 organizations in 32 states. Since it was founded in 2007, CCF has donated more than \$6.5 million.

In 2024, CAPTRUST employees submitted 156 grants to support organizations in which they are involved. This includes the fifth annual Giving Day of \$10,000 donations to 75 charities across the country, totaling \$750,000, as well as distributing more than \$250,000 in crisis grants for disasters and emergencies.

The CCF also announced its 2025 board, which will be led by President [Heather Shanahan](#), senior director of endowments and foundations, and Vice President Greg Delage, director of CAPTRUST at Work. The two will work alongside the following CAPTRUST colleagues:

- Lindsay Allen | Treasurer
- Mackenzie Ball | Events Chair
- Andrew Costello | Financial Literacy Chair
- Catherine Currin | Marketing Chair
- Rhonda Downum | Volunteer Chair
- Jackie Gonzalez | Secretary
- Ashley May | Regional Chair
- Alex Thompson | Fundraising Chair
- Julie Turner | Grants Chair

The board also announced its new oversight committee: Kirkland Caison, Paul Owen, Megan Loftin,



Jean Duffy, Kara Chase, Veronica Karas, Bryan Lewis, Justin Cohen, and John Peterson.

“Among the achievements I was most proud of was our ability to distribute more than \$250,000 in crisis grants. These donations provide immediate support for charities that are on the ground with those severely impacted by a natural disaster or other unexpected crisis. We look forward to continuing to make an impact on our communities in 2025,” said Shanahan.

“The need to support children in our communities is more evident than ever,” said Vice President Delage. “Heather and I are eager to collaborate with this talented team to enhance our impact on our communities.”

The CCF is run by CAPTRUST employees, with fundraising sourced largely from employee payroll deductions matched by CAPTRUST. To learn more about the CCF or to apply for a partnership grant (application closes March 15, 2025), visit [www.captrustcommunityfoundation.org](http://www.captrustcommunityfoundation.org).

### **About the CAPTRUST Community Foundation**

The CAPTRUST Community Foundation (CCF) was organized in 2007 to provide CAPTRUST employees with opportunities to participate as a group in community outreach efforts. The foundation is a registered 501(c)(3) charity. Follow CCF on [LinkedIn](#) for the latest news and information.

### **About CAPTRUST**

CAPTRUST was founded in 1997 as an independent registered investment advisor. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance services for individuals and families. The firm also offers a comprehensive suite of services for ultra-high-net-worth individuals to simplify their financial lives, mitigate risk, and perpetuate their legacies. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis and fee benchmarking, and employee advice programs.

---

## **Legal Notice**



This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors