



The CAPTRUST Community Foundation Announces \$1,166,450 in Donations for 2023

RALEIGH, NC – January 19, 2024 – The CAPTRUST Community Foundation (CCF), a CAPTRUST employee-run 501(c)(3) organization, announced today its annual donations for 2023: a record \$1,166,450, surpassing last year's donations. The CCF also unveiled its new board members and oversight committee.

The CCF provides grants to nonprofits across the country that benefit children. Since it was founded in 2007, the CCF has donated more than \$5 million. Through employee grants and other donations, hundreds of organizations received support across 32 states. In 2023, CAPTRUST employees submitted 159 grants to support organizations they are involved in, totaling \$317,000 in donations.

The CCF also announced its 2024 board, led for a second year by Co-Presidents [Veronica Karas](#), principal and financial advisor, and [Bryan Lewis](#), account manager of advice & wellness. The two will work alongside the following CAPTRUST colleagues:

- Mackenzie Ball | Events Chair
- Molly Brown | Financial Literacy Chair
- Catherine Currin | Marketing Chair
- Greg Delage | Treasurer
- Rhonda Downum | Volunteer Chair
- Jacquelyn Guthrie | Fundraising Chair
- Megan Loftin | Secretary
- Ashley May | Regional Chair
- Heather Shanahan | Grants Chair

The board added a new board position this year, regional chair, designed to foster participation across CAPTRUST's 89 regional offices. The board also announced its new oversight committee: Philip D'Unger, Alex Thompson, Giovanni Tiso, Michelle Miller, Kara Chase, Nathan Erickson,



Juanita Evans, Mike Volo, and Jackie Gonzalez.

“Bryan and I are thrilled to welcome new board members for 2024,” said Karas. “With the addition of a regional chair to our team, we will no doubt increase engagement from the entire firm in support of the foundation.”

“We continue to see the great need to invest in children within each community we serve,” said Lewis. “As a firm, we look forward to seeing even more involvement in CCF through payroll deductions, employee grants, and volunteer opportunities.”

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, 2024), visit www.captrustcommunityfoundation.org.

About the CAPTRUST Community Foundation

The CAPTRUST Community Foundation 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 and is eligible to receive tax-deductible contributions.

About CAPTRUST

CAPTRUST was founded in 1997 and registered CapFinancial Partners LLC as an independent registered investment advisor in 2003 in Raleigh, North Carolina. 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. With more than 1,500 employees across 90 locations nationwide, CAPTRUST oversees more than \$817 billion in assets, including just over \$668 billion in nondiscretionary assets under advisement and just over \$149 billion in discretionary managed account assets (as of September 30, 2023).

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