



The CAPTRUST Community Foundation Announces \$1,138,442 in Donations for 2022

RALEIGH, NC – January 19, 2023 – The [CAPTRUST Community Foundation \(CCF\)](#), a CAPTRUST employee-run 501(c)(3) organization, announced today its annual donations for 2022: a record \$1,138,442, surpassing last year's donations of \$1,054,000. 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 \$4.879 million. In 2022, the CCF continued to support hundreds of organizations through 201 grants across 31 states. For the Foundation's third annual [Giving Day](#), 69 organizations received a collective \$610,000.

The CCF also announced its new leadership, led by Co-Presidents Veronica Karas, senior financial advisor, and Bryan Lewis, account manager of advice & wellness. The two will work alongside the following CAPTRUST colleagues:

- Elizabeth Altman | Marketing Chair
- Molly Brown | Financial Literacy Chair
- Kara Chase | Events Chair
- Greg Delage | Treasurer
- Rhonda Downum | Volunteer Chair
- Mary Hime | Grants Chair
- Megan Loftin | Secretary
- Michelle Miller | Fundraising Chair



The board also announced new oversight members: Philip D'Unger, Kim Griggs-Murray, Ashley May, Oliver Norman, James Stenstrom, Juanita Evans, Nathan Erickson, Mike Volo, Mackenzie Ball, and Tim Harris.

"I am looking forward to working with Bryan and the rest of the CCF Board to continue the momentum from 2022 into the new year," said Karas. "After serving as the foundation's Financial Literacy Chair in 2022, I see the great need in our communities and the unique opportunity the CCF has to help."

"I'm honored to step into this leadership role after serving on the CCF board's oversight committee," said Lewis. "As we continue to grow at CAPTRUST, I am excited to see how our foundation can make an even larger impact in the community."

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 window open through March 15), 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. If you would like to donate or learn more about the CAPTRUST Community Foundation, please call 855.649.0943.

About CAPTRUST

CAPTRUST is an independent registered investment advisor founded in 1997 in Raleigh, North Carolina. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance 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/fee benchmarking, and employee advice programs. With more than 1,200 employees across 70 locations nationwide, CAPTRUST oversees more than \$110 billion in assets under management and more than \$750 billion in assets under advisement (as of September 30, 2022).

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