

CAPTRUST Community Foundation Supports 76 Nonprofits on Giving Day

RALEIGH, NC, August 24, 2023 – The <u>CAPTRUST Community Foundation (CCF)</u> today announced its donations to 76 charities across the country, totaling \$600,000 for the nonprofit's fourth annual Giving Day. The CCF is CAPTRUST's 501(c)(3) foundation. The foundation's mission is to enrich the lives of children in the local communities that CAPTRUST serves. Organizations were chosen by local CAPTRUST offices around the country, representing causes that both benefit children and are important to the respective office.

"We are honored to support a record number of organizations this year," said <u>Veronica Karas</u>, the CCF's co-president and a financial advisor at CAPTRUST. "On the CAPTRUST Community Foundation's fourth annual Giving Day, we are awarding funds to 76 worthy organizations that align with our foundation's mission—to benefit the lives of children."

The CCF has donated more than \$800,000 to nonprofits so far in 2023. Most of the foundation's fundraising is generated through employee payroll deductions, which are matched by CAPTRUST.

"The CAPTRUST Community Foundation is grateful that we can provide funds to more organizations each year with its Giving Day," said Bryan Lewis, co-president of the CCF and manager of advice and wellness at CAPTRUST. "Our annual Giving Day was created as a response to the pandemic, and our dedication to CAPTRUST's mission ensures it continues into its fourth year and beyond."

The following charities received support:

- Love Akron (Akron, OH | CAPTRUST Akron)
- Communities In Schools of Eastern Pennsylvania, Inc. (Allentown, PA | CAPTRUST Allentown)
- Christian City, Inc. (Union City, GA | CAPTRUST Alpharetta, GA)
- MUST Ministries (Marietta, GA | CAPTRUST Atlanta)
- Texas Advocacy Project (Austin, TX | CAPTRUST Austin)
- Dream Come True (Lehigh Valley, PA | CAPTRUST Bethlehem, PA)
- The Horizons School (Birmingham, AL | CAPTRUST Birmingham)
- Roy Maas Youth Alternatives (San Antonio, TX | CAPTRUST Boerne, TX)
- St. Mary's Center for Women and Children (Dorchester, MA | CAPTRUST Boston)

Page 1 August 24, 2023

- Special Olympics Tennessee (Nashville, TN | CAPTRUST Brentwood, TN)
- Augustine Literacy Project (Charlotte, NC | CAPTRUST Charlotte)
- First Steps (Crown Point, IN | CAPTRUST Chesterton, IN)
- VNA Hospice NWI—Phoenix Center (Valparaiso, IN | CAPTRUST Chesterton)
- Metropolitan Family Services (Chicago, IL | CAPTRUST Chicago)
- Society of Saint Vincent de Paul—Cincinnati (Cincinnati, OH | <u>CAPTRUST West Chester</u> Township, OH)
- Berston Field House (Flint, MI | CAPTRUST Clarkston, MI)
- Special Learning Center Foundation (Jefferson City, MO | CAPTRUST Columbia, MO)
- Children's Coalition of Aransas County (Rockport, TX | CAPTRUST Corpus Christi, TX)
- Bryan's House (Dallas, TX | CAPTRUST Dallas [Sherry Lane and Dallas Parkway])
- Envision Dallas (Dallas | CAPTRUST Dallas)
- Focus on Youth (West Chester, OH | CAPTRUST Dayton)
- The Javonte Williams Foundation (Florence, KY | CAPTRUST Greenwood Village, CO)
- Children's Home Society of New Jersey (Trenton, NJ | CAPTRUST Doylestown, PA)
- Sophie's Place | Sutter Medical Center Foundation (Sacramento, CA | Folsom, CA)
- Tarrant Area Food Bank (Fort Worth, TX | CAPTRUST Fort Worth)
- D.A. Blodgett—St. John's (Grand Rapids, MI | CAPTRUST Grand Rapids)
- Feed Kids First (Canton, OH | CAPTRUST Green, OH)
- ArcBARKS (Greensboro, NC | CAPTRUST Greensboro)
- Light of Life Rescue Mission (Pittsburgh, PA | CAPTRUST Greensburg, PA)
- Compass of Carolina (Greenville, SC | CAPTRUST Greenville, SC)
- Homes with Hope (Westport, CT | CAPTRUST Greenwich)
- New Creation VA (Harrisonburg, VA | CAPTRUST Harrisonburg)
- The Brookwood Community (Brookshire, TX | CAPTRUST Houston, TX)
- Nora's Home (Houston | CAPTRUST Houston)
- Children's Mercy Kansas City (Kansas City, MO | CAPTRUST Kansas City)
- Sussex Montessori School (Seaford, DE | CAPTRUST Lewes, DE)
- Washington and Lee University—ESOL Summer Program (Lexington, VA | <u>CAPTRUST</u> Lexington)
- Court Appointed Special Advocates for Children (CASA) (Parker, CO | <u>CAPTRUST Lone Tree</u>,
 CO)
- Friends of Sagamore, Inc. (Dix Hills, NY | CAPTRUST Lake Success, NY)
- Amazement Square (Lynchburg, VA | CAPTRUST Lynchburg)
- Domestic Abuse Project (Minneapolis, MN | CAPTRUST Minneapolis)
- STEMbiotic Communities, Inc. (Sarasota, FL | CAPTRUST Minnetonka)
- MANE—Montgomery Area Non-Traditional Equestrians (Pike Road, AL | <u>CAPTRUST</u> Montgomery, AL)
- Salama Urban Ministries (Nashville, TN | CAPTRUST Nashville)
- Youth Empowerment Project (New Orleans, LA | CAPTRUST New Orleans)
- The Bright School (New Orleans | CAPTRUST New Orleans)
- Bottom Line (Brooklyn, NY | CAPTRUST New York City)
- Wings Special Needs Community (Edmond, OK | CAPTRUST Oklahoma City, OK)

Page 2 August 24, 2023

- Toys for Tots (Omaha, NE | CAPTRUST Omaha)
- Ronald McDonald House Charities[®] of Central Florida (Orlando, FL | CAPTRUST Orlando)
- Hospice of the Valley (Phoenix, AZ | CAPTRUST Phoenix)
- KVC Kansas (Olathe, KS | CAPTRUST Prairie Village, KS)
- The No Woman, No Girl Initiative (Raleigh, NC | CAPTRUST Raleigh)
- Rise Richmond (Richmond, VA | CAPTRUST Richmond)
- Olive Crest (Riverside, CA | CAPTRUST Riverside)
- Bradley Free Clinic (Roanoke, VA | CAPTRUST Roanoke)
- River Oak Center for Children (Sacramento, CA | CAPTRUST Roseville, CA)
- Cristo Rey High School Sacramento (Sacramento, CA | CAPTRUST Sacramento)
- Operation Underground Railroad (Salt Lake City, UT | <u>CAPTRUST Salt Lake City</u>)
- Wonders & Worries (San Antonio, TX | CAPTRUST San Antonio)
- San Antonio Youth Literacy (San Antonio, TX | CAPTRUST San Antonio)
- Rise Recovery (San Antonio, TX | CAPTRUST San Antonio)
- The Boys & Girls Club of Burbank and Greater East Valley (Burbank, CA | <u>CAPTRUST San</u> Ramon, CA)
- Friends of the Children (San Franciso, CA | CAPTRUST San Ramon)
- Women's Economic Ventures (Santa Barbara, CA | CAPTRUST Santa Barbara)
- Fleece & Thank You (Farmington Hills, MI | CAPTRUST Southfield, MI)
- St. Louis Children's Hospital Foundation (St. Louis, MO | CAPTRUST St. Louis)
- Girls on the Run Georgia (Atlanta, GA | CAPTRUST Stockbridge, GA)
- Chapters Health Foundation (Temple Terrace, FL | CAPTRUST Tampa, FL)
- Make-A-Wish[®] Iowa (Urbandale, IA | CAPTRUST Des Moines, IA)
- Cranio Care Bears (Kalispell, MT | CAPTRUST Warren, NJ)
- Minnesota 4-H (Minneapolis, MN | CAPTRUST Wayzata)
- Casa Pacifica Centers for Children and Families (Camarillo, CA | CAPTRUST Westlake Village)
- Freedom Gates Boys Ranch (Kiowa, KS | CAPTRUST Wichita, KS)
- NourishNC (Wilmington, NC | CAPTRUST Wilmington)
- Eden Village of Wilmington (Wilmington, NC | CAPTRUST Wilmington)

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 to or learn more about the CAPTRUST Community Foundation, please call 855.649.0943.

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

Page 3 August 24, 2023

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-networth 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 1,300 employees across 75 locations nationwide, CAPTRUST oversees more than \$714 billion in assets, including just over \$598 billion in nondiscretionary assets under advisement and just under \$116 billion in discretionary managed account assets (as of December 31, 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.

© 2025 CAPTRUST Financial Advisors

Page 4 August 24, 2023