



CAPTRUST Welcome from Fielding Miller | Plan Sponsors

[View Transcript](#)

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

Fielding Miller:

Hello, my name is Fielding Miller. Now the CEO and co-founder of CAPTRUST. I wanted you to know that you have my personal commitment and the commitment of everyone here at CAPTRUST. There's a few things I would like you to know about CAPTRUST. First, we are a mission-led firm. And what that means is that we're dedicated to a common mission throughout the company. Our mission is to enrich the lives of our clients, colleagues, and communities through sound advice, integrity, and a commitment to service beyond expectation. Now, I'm sure you're familiar with mission statements, but ours is a little different. And let me explain why. First of all, we put our clients, you, and our colleagues and our communities on even stead. And what I mean by that is this, nothing happens here at CAPTRUST, unless we have clients and we take good care of them.

But if we get great clients like you, and we don't take care of our colleagues, you're not going to get good results or service. If we're successful at having great clients like you and having great



colleagues to

take care of you, we can take that success and we can reinvest it back in our communities to those that

are really in need. The second thing I would like you to know about CAPTRUST is that we are a company

that's committed to employee ownership. This should be important to you because if the people that are serving you are owners in this company, and the only way we can survive as a business is if we keep

you happy, then you know whenever you call, or whenever you need something, you're talking to somebody that's fully aligned with you and committed to helping you reach your goals.

The third thing I would like you to know is we're always committed to investing in the future to ensure we have the right tools, the right technologies, and the right services. And the way we do that is we reinvest half of our profits every year back in the business. I'd like to invite you to visit our website captrust.com so you can learn more about our people, and our resources, and our services, and all the

ways that we're reinvesting back in our communities. So in closing, I just want to welcome you to the CAPTRUST family, and let you know that we hope to be serving you for many, many years to come.

Thank you.

Disclosure: CapFinancial Partners, LLC (doing business as "CAPTRUST" or "CAPTRUST Financial Advisors")

is an Investment Adviser registered under the Investment Advisers Act of 1940. However, CAPTRUST

video presentations are designed to be educational and do not include individual investment advice. Opinions expressed in this video are subject to change without notice. Statistics and data have come from sources believed to be reliable but are not guaranteed to be accurate or complete. This is not a solicitation to invest in any legal, medical, tax or accounting advice. If you require such advice, you should contact the appropriate legal, accounting, or tax advisor. 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 © 2023 CAPTRUST Financial Advisors

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