

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

Hi there. Thank you for visiting our website. We're glad that you're exploring opportunities to parlay the business you've worked so hard to build into a future that's even more successful. I can tell you that the people who have joined us over the years have gone through a very thorough process to make sure they found the right partner, and those same people are usually trying to solve for several things, probably just like you.

They're trying to solve for succession; they're trying to solve for growth. They're trying to reduce the increasing complexity of running their business. In short, they want more margin in their lives, and so many of these same people that I've interacted with simply want to get back to why they got in the business in the first place: to advise clients. Keep in mind that every single firm or team that has joined us over the years has come to us from a position of strength.

They were not desperate to sell or looking to sunset in the near future. They all had very well-run businesses, exceptional employees, and very strong client followings. Of course, a successful partnership has to hit all the right notes. It must be a good move for your clients, it must be a good move for your colleagues, and it must have very attractive economics for your shareholders.

Our goal for this website is to provide you with some real insight into what it would be like to partner with CAPTRUST. Now my father often told me, "Never trust anyone that says trust me." So don't take my word for it. Take the word of the many partners we've added through transactions over the last several years.

Now keep in mind that each group talked to several different firms, and they finally landed on us, and I want you to hear directly from them: Why did they do that? Even better, I want you to hear from them how it has worked after the transaction because that's what really matters.

We would love to have an initial conversation with you to see if we might be the partner that you can go the distance with. Thank you for taking a little time to hear from me. I do hope we get the chance to meet in person soon. Thank you.