

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

- Eric Bailey: We had a lot of discussions internally about how this transaction would impact our employees.
- Mark Davis: You feel a great responsibility for the teammates—these folks who’ve supported you and helped you build your business. And what you may be thinking is, gee, if I go to CAPTRUST, I’m selling them out, or I’m leaving them behind. It’s exactly the opposite. You’re giving opportunity to your team.
- Jennifer Doss: We’re a growth firm, and that means there’s always new positions being created, new departments, new ideas, and new services that we want to do, and somebody’s got to lead that, and somebody’s got to own that.
- Bob Jones: On an eight-person team, we really had to have people doing what we wanted them to do. CAPTRUST allows them to prosper at the things they want to do.
- Marcus Magyar: I was doing education, but I wanted to move more into a wealth advisory role. Now being at CAPTRUST, I have moved myself from being on the institutional team to a wealth advisor managing about \$50 million in assets. At our prior firm, there was no way I would’ve been able to do that in such a short period of time.
- Speaker 6: We have a phrase here: a slogan called “One Up, One Unified Practice.”
- Rick Shoff: And what that really means is, how do we get better together?
- Audrey Wheat: Everyone here at CAPTRUST wants to see you grow and succeed and be put to your highest and best use. The director that was my mentor for so long is now my manager, and I work with him on a day-to-day basis to make sure that we’re working on things that fulfill us and also help move the company forward.
- Bonnie McCullou...: By combining with CAPTRUST, you are solving for your own succession, but not only for you personally—also for your employees. You are ensuring a pathway, a very bright pathway, for the future.
- Rick Shoff: We’re an employee-owned company. Over two-thirds of our colleagues already have ownership.
- Ellen Shaer: And everybody is eligible to be a shareholder, whether you are answering the phone at the front desk or on the operating committee. It’s something that is available to all CAPTRUST employees and is definitely unique in the industry.
- Veronica Karas: Prior to the merger, I don’t think I would’ve ever considered to ask for shares of the company because we were so small. Now, under CAPTRUST, I have this opportunity to actually own shares of a company that I work for. Everyone in the firm is heading in the same direction.

Mark Davis:

The opportunity those folks get as part of the CAPTRUST team is so much bigger than they would've been able to get at each of our individual advisory shops. It's phenomenal.

Devyn Duex:

CAPTRUST is the strongest REA in the business, and every time we bring somebody in, it just lifts us up even higher. If you come and be a part of CAPTRUST, I mean, you can accomplish whatever goal you have for yourself. The sky's the limit, really.