

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

- Eric Bailey: Clients were a big part of our decision in joining CAPTRUST. They asked what it meant for us, and we could answer that it was a good decision for us as partners, and it's a good decision for [clients] because the resources are going to expand and very little, if anything, would be taken away.
- Steve Wilt: One of the great things about CAPTRUST is its ability to help us give better service to our clients and the participants, and that comes from the centralized service model. So for example, we have a research team of 60 people who are meeting with the fund managers on an annual basis, talking to them quarterly, [and] tracking those funds on a daily basis.
- Eileen Shaer: For the advisors joining, they get the lift from the research team [and] from the operations team, and they're able to offload a lot of support things so that they can bring something better to their clients and to their lives.
- Pat Bills: We had a client just a couple of weeks ago say, "We enjoyed working with you at the old company, but we feel like we have so much more since you've made the transition to CAPTRUST."
- Mark Davis: The responsibility that that takes off of my shoulders and, candidly, the peace of mind when I look in the mirror and know my clients are being served the way I would expect them to be served, in an optimal way . . . the difference is huge.
- John Curry: We have this rule called the no-golf-ball rule. No CAPTRUST person will accept anything of value from an industry service provider—nothing even so trivial as a logoed golf ball.
- Chris Kulick: Come to find out, it'd been over 30 years since Fielding [Miller] had that vision to have complete objectivity on behalf of the clients.
- Pat Bills: That is something that clients want to hear.
- Mark Davis: We think we deliver a better, stronger, more solid product because we're not selling somebody else's advice. We're selling our own, and it's always our best thinking.
- Cathy Seeber: The people around you and the culture of helping each other, you feel it, and that just kind of filters down to the client. The client realizes it too. I had a duty to my clients to put myself in a position where I could offer them the best of the best, and at CAPTRUST, I knew I had that.
- Chris Kulick: For me, being an advisor is being in front of clients, and CAPTRUST allows me to do that with the full faith that the business is being run better than I could ever do it myself.

Bob Jones:

Your clients are going to be happy. Your team is going to be happier, and you are going to be happiest. I think that that's a great combination.