

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

- Rush Benton: By being a part of CAPTRUST, you gain resources, expertise, and scale, which means you can drive much better outcomes for your clients, for your employees, and for you as a business owner.
- Rick Shoff: You're very entrepreneurial now, but imagine if you had that same entrepreneurial spirit, but you had a team of 500 people in every area from IT to research, to technology, to project management, to funding it. That's the ultimate entrepreneurial environment.
- Pat Bills: I would tell you that independence is one of our hallmarks.
- Steve Wilt: We call it freedom in a framework, and what that means is that I run the Akron office, I have my own business plan, [and] I build my own team, but I do it within the framework of CAPTRUST, and they want to help you grow.
- Frank Bub: Since day one, we've been bringing the institutional advisory business together with the individual wealth advisory business. Because it's already here, and we've already done it, and it's been successful, we can help you get up to speed that much faster.
- Chris Kulick: Having over 150 advisors, collaborating, [and] sharing stories gives you an undeniable edge.
- Speaker 7: Everyone is passionate, and we're working towards the same goal.
- Mark Davis: I get to bring in full-time analysts that are absolutely at the top of their game on the investment side. I get to bring in partners who can tell you the ins and outs of every record-keeping platform in America.
- Bob Jones: Coming to a place like CAPTRUST allows you to offload the things in your daily life that you no longer want to do. That gives you more opportunities to do the things you want to do. And yet, the business, the thing you built, still grows and still prospers.
- Rick Shoff: We invest half of our profits every year back into improving our client value proposition, and that amount that we invest is larger than 98 percent of our competitors' total revenue.
- Jon Meyer: Our ability to reinvest in our business has led us to develop custom solutions that are enhancing the value for our advisors, our colleagues, and our clients.
- Bonnie: From the front desk to Fielding [Miller]'s office, all employees have the opportunity to be a shareholder at CAPTRUST, and from where we are today to that next 10-year goal, the value that is going to be created for every employee at this firm is significant.

Steve Wilt: You [have] really got to consider who you want your partners to be for the next 20 years.

Mark Davis: At the end of the day, being part of something bigger, being part of something stronger, where you don't just own yourself, [but] you own each other . . . it's much better diversification and much better strength in numbers. And I don't care who you are. I don't care how solid your individual business is. You cannot have the muscle, the depth of resources, and frankly, the strength of the integrity of another 520-some-odd employees to hold you up, to make you strong, [and] to make you better for your clients. You can't do it.