

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

Fielding Miller:

The way we've structured this business and built it over the years was to start with a client and work backwards. We want to understand what the client needs are. We want to understand what problems we're helping that client solve and build the infrastructure to support the advisor serving those clients.

Wilson Hoyle:

I believe that everyone is best served by having a financial advisor to help them with the financial matters. And once you make that decision, you want to know just a few things about that company. The most important is that that platform has to be trustworthy, that they have nothing in place that compromises the integrity of their relationship with their clients.

Secondly, you're looking for depth access and leverage. You want to have the best offerings. You want to have the best people, or you want to have access to the best for your financial matters. And then finally, experience matters. You want to know that they deal with complexity each and every day, and that you can benefit from the hindsight and the experience of other clients like yourself.

John Wing:

The big four partner in particular has very unique needs. They have complexity in their partnership benefits, and they have complexity in their investment restrictions. We've developed an expertise around that over the past two decades

Kyle Olson:

Because of their audit relationships with so many Fortune 500 firms across the country, they can't own those securities. In some ways, they can't even own mutual funds or ETFs that hold too heavy of a weighting in those securities.

Dan Westin:

As a result, we've built out diversified portfolios that adhere to the restrictions, and that gives them a lot of peace of mind to know that they have a firm that specializes in building compliant investment strategies to put them in a really good position long-term for financial success.

Greg Middleton:

CAPTRUST has a centralized model, and what that means is we want our advisors at their highest and best use, so however we can support them so they can add more value to clients is really important.

Wilson Hoyle:

You're getting the benefit of not just the expertise of 20 people, but the expertise of 700 plus that are constantly working for you and with you.

Eddie Welch:

We have a wealth services team that provides comprehensive financial planning. We have our client services team, which is really the backbone of our client experience. And finally, our performance reporting team helps our clients understand how they're doing in relation to their financial goals.

John Wing:

CAPTRUST's scale, size, and resources and presence across the country is allowing us to serve our clients in ways that we never would have been able to do on our own.

Dan Westin:

There are broadened and elevated services available at CAPTRUST in the family office space, in the private markets offerings that our clients are asking for.

John Wing:

One of our long-term clients says that the greatest value that we provide is our knowledge base.

David Hood:

We really provide clients an investment experience that they can't get anywhere else. We have an extremely deep team and it's specialized, so within stocks covering US stocks, international stocks, across the market cap spectrum from large cap to small cap, from value to growth.

Mike Vogelzang:

Whether it's our fixed income experts, whether it's our currency desk, whether it's our traders on the trading desk, bringing all of those people together in the same room to find a common view is what allows us to be stronger as a collective, as opposed to an individual group.

Phyllis Klein:

I think CAPTRUST clients actually can sense the urgency that we have around delivering service to them, and that is pervasive throughout the company.

Frank Bub:

Whether they're retirement planning needs, whether they're complex needs around trusted estate planning, we've created an environment where folks are truly working together to bring a complete solution to our clients.

Kyle Olson:

It's really important for us and for our team to really get to know people and to have that long-term relationship where we understand what their goals and objectives are, a college education funding goal for their kids, upcoming retirement, potentially a wedding to plan for. What I love doing is coming alongside clients in those moments that matter in preparation for them so they can focus on the experience of that and not worry about where's the money going to come from.

Wilson Hoyle:

Every year for 20 plus years, we've taken half of our earnings and invested it back into the business.

Fielding Miller:

It enables us to seek new opportunities and build services for our clients. It enables us to invest in technologies that are well ahead of the curve, but it also enables us to endure adversities.

Jon Meyer:

Whether it's been a shift to the cloud in 2017, or new trading systems that we're implementing today, we're delivering world-class security solutions to our wealth customers.

Nick DeCenso:

We utilize a best in class financial planning tool called WealthView. It's just been tremendously powerful to help our clients visualize their financial life and where we can help take them into the future.

David Hood:

I think what's different about this firm is just what you feel when you're here and it's what you feel when you interact with our people.

Rush Benton:

We've got this wonderful culture where ownership is widespread. Every employee has the opportunity to be an owner. And if I'm a client, I'd rather be taken care of by somebody who owns a company than somebody who's just paid by a company. Everybody's pulling in the same direction to provide me with the best level of service and the best results that can be found.

John Wing:

The driving motivation for me has always been about people.

Dan Westin:

What a privilege for us to be with world-class consultants, auditors, and tax professionals, helping them achieve their goals.

John Wing:

We're taking care of a partner and their family. We want our treat your neighbor as yourself values to come through everything we do.

Wilson Hoyle:

When you have that culture and that alignment with talented people and they're hardwired to get better every day, having a really good consistent client experience is almost assured.

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