

Wealth Management With a Social Conscience

*CapTrust Is Solemnly Committed to Client Relationships—
and to ‘Giving Back’*



Can a well-known independent consulting practice—managed by 13 dedicated investment professionals and guided by a mission to serve its clients as “trusted advocates in the financial marketplace”—also transform lives in its community and overseas?

Lending a Hand Overseas

In the last year alone, CapTrust team members played key roles as part of humanitarian missions in India, Kenya, Zambia and elsewhere.

“We cover a lot of the expense, and employees do not have to use it as vacation time,” says Johnson. “They return to CapTrust with a broad perspective of the world that fits well with the practice’s DNA and our commitment to caring for people’s total well-being.”

Yes, if it’s CapTrust, the Holland, Michigan-based practice founded in 1997 by Financial Advisor Bruce H. Johnson, CIMA, who began his career in the investment industry in 1982.

Specializing in wealth management and customized investment strategies, with a client concentration in West Michigan, the practice is also heavily committed to giving back to the community.

“We’re in the business of relationships,” Johnson says. “We educate our clients and empower them to make wise investment decisions.” This is especially helpful, say, when a family business is sold and suddenly the family faces significant life decisions. “It’s almost like a sacred trust,” Johnson says. “Wherever a client is in life, we are here to support them in making decisions that help them reach their objectives.”

Playing a Leadership Role in the Community

Locally, CapTrust formed a group called Peaks and Valleys that offers support and career coaching for mid-career men in their late forties, fifties or early sixties, who, though extremely qualified, were let go during an economic downturn. Often, says Johnson, they lacked the skills to sell themselves to new employers. So the practice brought in local companies, human resources directors and mentors to help the men, many of whom, upon finding gainful re-employment, return to the group as mentors themselves.

“CapTrust is about more than investment planning and wealth management. We are here to serve families and people in the community who have serious needs,” Johnson says.

Johnson himself very much lives a life committed to service—whether serving as a longtime trustee of the state of Michigan’s Municipal Employees’ Retirement System or volunteering to run a summer camp for Michigan children, with a focus on those from fatherless homes. Comments Johnson, “I love giving back to a state and to the people who have done so much for me.”

CapTrust’s clients are full partners in shaping their own destiny, Johnson adds. “We never lose sight of our mission, that we are our clients’ ‘trusted advocates,’ and that our work together must be tied to what success means to *them*.”

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