

WEST MICHIGAN-BASED ADVISORY FIRM



A Passionate Pursuit of Doing Right by Clients

Founded in 1997, this Holland-based registered investment advisory firm's namesake is rooted in two core competencies: capital management and trust.

Nearly two decades ago, CapTrust opened its doors with a vision to provide clients access to the best investment resources—and the best service—in the world. Ever since, that vision has been both a road map and a code of conduct for the 15 team members who call CapTrust home.

"We're advocates for clients by not only offering exceptional, competitively priced solutions but also by aligning customized portfolios to meet their personal, long-term objectives," says Founder Bruce Johnson, CIMA®. "We operate on the premise that if it's right for the client, it's right for us."

Offering investment consulting and wealth planning to high net worth families and institutions, CapTrust adheres to the investment principles of crafting well-defined plans, implementing discipline to overcome emotional investing, and investing actively with the intention of winning. A team-based, consultative

model is employed to educate and empower clients to make wise investment decisions.

"Our investment consulting team meets every week to review our investments. It's a dynamic process that includes healthy pushback, which gives clients the best advice from our collective knowledge," says Consulting Director Dirk Zwiep, CIMA. "Our long-term approach means we believe success is better measured by a calendar than a stopwatch."

But before a single dime is invested, CapTrust believes a foundation of trust must be firmly secured.

People First

"We see ourselves as first in the relationship business and second in the investment business," says Managing Partner Brian VandenBrink, CIMA. "Client intimacy means everything. Trust is the cornerstone of every healthy relationship, and we're purposeful about earning it."

It's through building healthy

relationships that CapTrust can understand the nuances of every client's investment needs—whether that's a need for preservation, a need for capital growth, or even a need to coordinate with other professionals in the client's network, such as estate attorneys and tax specialists.

"As a pure registered investment advisory firm without a commissions model, our only motivation is to see clients succeed," says VandenBrink.

This deeply respected, people-first mentality permeates CapTrust's internal culture as well. "We have a close-knit team that serves each other well. We practice internally what we strive to offer externally to clients," says Zwiep. "Every team member has a passion to be excellent in whatever he or she does."

"A client recently said to me, 'I'm grateful for your investment outcomes, but your firm's service is second to none,'" says Johnson. "We can't control the market, but we can control the excellence of our clients' experiences."

CAPTRUST

CapTrust is located at 85 E. 8th Street, Suite 160, in Holland, Michigan. For more information, call **616-392-5332** or visit **captrustholland.com**.

CapTrust Financial Advisors is an SEC-registered investment adviser with its principal place of business in the State of Michigan. Past performance is no guarantee of future results.



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