



CAPTRUST

Locations: North Carolina (HQ)
Industries: Diversified Financials

RISK LEVEL:



Lower Risk

DESCRIPTION:

CAPTRUST is a financial services firm headquartered in North Carolina. CAPTRUST does not provide viewpoint protections for its employees but has not publicly terminated business relationships based on views or beliefs. While CAPTRUST offers a selection of products, including ESG and religious funds, these screens are providing based on customer preferences and not enforced upon all investors. The company has not used its corporate funds for ideological purposes but has expressed some support for DEI causes. For these reasons, CAPTRUST receives a Lower Risk rating.

Corporate Weaponization

Has denied service to customers, suppliers, or vendors due to their political views or religious beliefs OR corporately boycotts, divests, or sanctions regions, people groups, or industries. Lower Risk

CAPTRUST has not publicly fired customers, suppliers, or vendors based on political views or religious beliefs (1). CAPTRUST offers both ESG and religious funds for institutional investors, but these choices do not affect other customers who do not opt into these preferences for investing.

Charitable giving (including employee matching programs) policies or practices discriminate against charitable organizations based on views or religious beliefs. Lower Risk

CAPTRUST does not discriminate against charitable organizations based on views or beliefs (1)(2).

Employment policies fail to protect against discrimination based on political affiliation/views and/or religion. High Risk

CAPTRUST does not provide viewpoint protections for its employees (1)(2).

Corporate Governance and Public Policy

Uses corporate reputation to support ideological causes and/or organizations hostile to freedom of expression. Medium Risk

CAPTRUST's CEO signed the CEO Action for Diversity & Inclusion pledge, which includes a commitment to promote DEI through

bias education training in the workplace⁽¹⁾. CAPTRUST featured Sarah Harris and Jenn McCabe from Armanino to discuss the importance of DEI in investing ⁽²⁾.

Uses corporate funds to advance ideological causes, organizations, or policies hostile to freedom of expression. Lower Risk

CAPTRUST has not use corporate funds to advance ideological causes, organizations, or policies ⁽¹⁾⁽²⁾.

Uses corporate political contributions for ideological, non-business purposes.

N/A

CAPTRUST does not operate a PAC at this time ⁽¹⁾⁽²⁾.

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