

# Capital City Investments Recognized As Top Investment Program

TALLAHASSEE, Fla., March 09, 2022 (GLOBE NEWSWIRE) -- Capital City Investments, a wealth management program located at Capital City Bank, has received the distinguished honor of being named the 2021 Top Investment Program of the Year by LPL Financial, a partner to the program providing comprehensive investment and wealth management services.

Led by program manager Bill Moor, president of Capital City Investments as well as Capital City Strategic Wealth and Capital City Trust Company, the program and its financial professionals were recognized during LPL's annual Program Leaders Conference held Feb. 16-18 in Fort Lauderdale, Fla. As the Top Investment Program of 2021, Capital City Investments has distinguished itself among approximately 800 LPL Financial programs located at bank and credit unions. The award is determined based on numerous quantitative and qualitative criteria<sup>^</sup> including their display of innovation, leadership in driving change and excellence in execution.

"On behalf of the entire LPL community, I am pleased to congratulate Bill and the entire team at Capital City Investments for their exceptional business results and exemplary dedication to helping clients gain access to personalized financial advice in an everchanging environment," said Shawn Mihal, LPL Financial executive vice president, Institution Services Relationship Management. "Their commitment to growing the investment program, ensuring their financial professionals are successful and helping their clients work toward their financial goals is reflected day in and day out. The program has built a strong foundation and has set high standards for growing their team with new career paths, fostering exceptional partnerships internally and externally to increase business development strategies, and driving impressive asset growth. We are proud to be a strategic partner to help them execute on their initiatives efficiently and effectively, and we wish them continued success."

"Our Capital City Investments team must thank our loyal clients for making this honor possible," said Moor. "When clients entrust us with their financial planning and investment management, they are really trusting us to help accomplish their dreams and goals. We take this privilege seriously and will continue to strive to deliver a superior wealth-management experience for both our current and future clients."

Capital City Investments advisors provide a full range of financial services, including retirement and financial planning, individual money management, individual stocks and bonds, mutual funds and annuities. Services are offered to Alabama, Florida, and Georgia residents and business owners in the greater Macon, Ga., Brooksville, Fla., Gainesville, Fla. and Tallahassee, Fla. areas. Visit <u>www.capitalcityinvestments.com</u> to learn more.

LPL Financial is a leading provider of third-party investment services to banks and credit

unions, offering wealth management and investment services to approximately 800 banks and credit unions nationwide\*. LPL provides personalized service and support, a robust, integrated technology platform, investment platforms, markets insights, and practice management solutions that enable the delivery of personalized financial guidance.

## About Capital City Bank Group, Inc.

<u>Capital City Bank Group, Inc.</u> (Nasdaq: CCBG) is one of the largest publicly traded financial holding companies headquartered in Florida and has approximately \$4.3 billion in assets. We provide a full range of banking services, including traditional deposit and credit services, mortgage banking, asset management, trust, merchant services, bankcards, securities brokerage services and life insurance. Our bank subsidiary, Capital City Bank, was founded in 1895 and now has 57 banking offices and 86 ATMs/ITMs in Florida, Georgia and Alabama. For more information about Capital City Bank Group, Inc., visit <u>www.ccbg.com</u>.

### About LPL Financial

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader in the markets we serve, \* supporting nearly 20,000 financial advisors, and approximately 800 institution-based investment programs and 500 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

<sup>\*</sup>Top RIA custodian (Cerulli Associates, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S (Based on total revenues, Financial Planning magazine 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehrer Bielan Research & Consulting Annual TPM Report); Fortune 500 Company as of June 2021. LPL and its affiliated companies provide financial services only from the United States.

Securities and advisory services offered through LPL Financial LLC, an SEC-registered broker-dealer and investment advisor. Member FINRA/ SIPC. We routinely disclose information that may be important to shareholders in the "Investor Relations" or "Press Releases" section of our website.

<sup>^</sup>Investment Programs located at banks and credit unions were evaluated by: Rep Productivity; Asset Under Management (AUM) Growth; New Net Assets; Advisory Growth; Headcount Growth; Total AUM Growth; Total GDC. The top 40 in each category were given points and then the scores for each category were combined to give the investment programs cumulative score. The data is reviewed and the strongest candidates for are considered and confirmed by LPL Financial.

Throughout this communication, the terms "financial advisors" and "advisors" include registered representatives and/or investment adviser representatives affiliated with LPL Financial LLC, an SEC registered broker-dealer and investment adviser.

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. Capital City Bank and Capital City Investments are not registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Capital City Investments, and may also be employees of Capital City Bank. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Capital City Bank or Capital City Investments. Securities and insurance offered through LPL or its affiliates are:

#### Not FDIC Insured · Not Bank Guaranteed · May Lose Value Not Insured by Any Federal Government Agency · Not a Bank Deposit

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Source: Capital City Bank Group