



HEIDI B. SPENCER
DIRECTOR OF CLIENT SERVICES
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Heidi Spencer brings more than twenty-nine years of experience in the financial services industry to her role as Director of Client Services.

As a central point of contact for Catholic and institutional clients of Managing Principal Stephen H. Schott and Investment Consultant William M. Brown, Heidi assists in the oversight of clients' investment program, attending to their service-related and day-to-day operational needs. Heidi's focus helps to ensure that client requests and those of their investment advisor are executed in an efficient and timely manner. Her contributory knowledge of internal processes, performance analysis, reporting, and investment consulting partnered with the team of professionals at CapTrust provides what we feel is high quality, personalized and effective client service.

Her previous work experience includes department head at First National Bank, sales assistant and cashier at Kidder Peabody & Co., and operations/office manager at Northern Capital Mortgage. She has completed the Investment Management Consultants Association (IMCA) program, Essentials of Investment Consulting, and holds the Series 65 registration with FINRA.

Heidi is active in her community and participates in a variety of volunteer programs.

YEARS EXPERIENCE

29 +

EDUCATION

North Lake College – Business Administration

Investment Management Consultants Association's (IMCA) program, Essentials of Investment Consulting

ORGANIZATIONS

Exeter Chamber of Commerce
Children's Fund

Youth Leadership Council at
Emmanuel Episcopal Church

General Federation of Women's
Clubs

SPECIALIZES IN

Client Services, religious and
institutional investment services