

# PAYING DIVIDENDS

## Financial Firms Invest in Their Own

By Symone C. Skrzycki

Cash. Capital. Currency. These words characterize the powerful resource of money.

Compassion. Caring. Commitment. These are among the attributes demonstrated by Best Places to Work organizations.

At these four financial services companies – WestPoint Financial Group, Capital Group, Ambassador Enterprises and Oak Street Funding – the two are successfully combined.

### WestPoint Financial Group | Indianapolis office

**BizVoice®:** Fun is front and center at WestPoint. What's an example?

**Josh Plank (one of the partners):** “Our Annual Awards Gala. We always reveal where our firm incentive trip will be. This year, I busted out and surprised everyone in a hula skirt and flowered leis (destination: Hawaii for top producers and a guest).”

**BV:** What types of wellness activities are offered?

**Lauren Fox (marketing director):** “We have access to a gym membership at the Five Seasons Family Sports Club (courtesy of a corporate discount) that people take advantage of. It's right across the street from the office, which is located near the Monon Trail.”

**BV:** Describe one of your most popular excursions.

**Plank:** “A client appreciation event at The Children's Museum of Indianapolis. It's a haunted house. They let us bring in 1,000 people – and we get 1,000 people every year! They'll do the first part with the lights on for the younger kids and later they'll do the (Frightening Hours). Everyone can have dinner. They absolutely love it.”



The WestPoint band belts out a song.

**RESOURCE:** Josh Plank and Lauren Fox, WestPoint Financial Group, at [www.westpointfinancialgroup.com](http://www.westpointfinancialgroup.com)

### Capital Group | Carmel campus

**BizVoice:** How does Capital promote diversity and inclusion?

**Chris Trede (general manager):** “The thing we're probably most proud of is the Indianapolis Diversity and Inclusion Council. We've got about a dozen folks from this site who are passionate about (those topics). They're charged with making sure people understand cultural competency, different cultures and differences of opinion.”



Associates square off for the CapGroup 500. Winners receive a donation to their charity of choice.

**BV:** Share a powerful benefit related to retirement planning.

**Trede:** “We contribute 15% of an associate's annual compensation (salary, overtime and bonuses) into an individual retirement plan. In addition to that, we have a 401(k) program. From a retirement perspective, we put our money where our mouth is, so to speak. It's a really special thing.”

**BV:** In what other ways does Capital carry out its mission to improve people's lives through successful investing?

**Trede:** “It's a company that controls its own destiny. Based on our profitability, we have all associates share in a bonus at the end of each fiscal year.”

**Jim Toomey (general manager):** “Every Capital Group associate in North America is an investor in American Funds (part of Capital Group). You talk about what is the secret sauce of superior service? Our associates are all owners of American Funds.”

**RESOURCE:** Chris Trede and Jim Toomey, Capital Group, at [thecapitalgroup.com](http://thecapitalgroup.com)

## Ambassador Enterprises (AE) | Fort Wayne site

**BizVoice:** How do prayer and professional development converge at Ambassa<sup>da</sup>or?

**Janie Waldron (senior executive manager for people, culture and brand):** “Everyone meets on Monday mornings in our learning center from 8 to 8:30. That’s an opportunity to give a high-level update from each of our organizational areas on what’s going on.

“It’s also an opportunity for any prayer requests that have come up from the previous week. We have a time of group prayer so we can start our week knowing what those are and supporting our team members.”

**BV:** Talk about your MBA (master of business administration) program.

**Waldron:** “Our AE Corporate University developed an experiential learning program with Huntington University (HU) as the accrediting university. Previously, HU didn’t have an MBA program. We have 13 team members who are currently enrolled in that (company-funded) program and will graduate with their MBA in 2018. It will be open to the public this fall.”

**BV:** How does AE cultivate a passion for community service?

**Waldron:** “We provide 40 hours of paid time off (annually) to every single one of our team members to volunteer in their community. We also match up to \$1,000 per team member. We’re a for-profit, philanthropic private equity company. Financial sustainability is what makes our organization possible, but we’re passionate about supporting our community and the non-profits that exist within it.”



Staff dine at an in-house lunch café, while others whet their appetites for philanthropy at Vincent Village, which serves homeless families with children.



**RESOURCE:** Janie Waldron, Ambassador Enterprises, at [www.ambassador-enterprises.com](http://www.ambassador-enterprises.com)

## Oak Street Funding (OSF) | Indianapolis office

**BizVoice:** What are OSF bucks?

**Rick Dennen (president and CEO):** “(Earned based on employment anniversaries and extraordinary performance), employees can use them for a number of things, such as VISA gift cards, Amazon gift cards and Oak Street apparel.”

**BV:** How did you weather challenges arising when First Financial Bank purchased Oak Street (now a subsidiary) in 2015?

**Dennen:** “We were very transparent to all of the employees when we were up for sale. Their concern was, ‘Uh oh. What’s it going to do to our culture?’ We had 21 offers for the business. We landed with a regional bank that had those same characteristics, the same overarching care for the employees. It’s a Midwestern-based bank that has great leadership. That was very important.”

**BV:** Recall an experience illustrating the powerful bond Oak Street employees share.

**Dennen:** “A couple of years ago, we did a *Biggest Loser* contest and paid \$5 for every pound lost. One of the long-term employees – and she’s still with us – identified breast cancer as a result of that event. The company bought t-shirts to support her. It rallied around her as she went through a mastectomy and a rebuild. Those are the kinds of things we do. The people are pretty tight here.”



Crayons, colored pencils, calculators and more are prepared for a supply drive.

**RESOURCE:** Rick Dennen, Oak Street Funding, at [www.oakstreetfunding.com](http://www.oakstreetfunding.com)