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Financial Executives of the Year: David Labiak

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Staff *Triad Business Journal*

Title: Senior portfolio manager and CFO

What does your company do? Registered investment adviser that builds customized portfolios for individuals and retirement plans for small to midsize companies.

City: Greensboro

Years in current position: 12

Years at organization: 19.5

Age: 45

Family: Spouse Holly Labiak; children Peyton and Reagan

Education: Bachelor's, accounting, University of North Carolina at Charlotte; MBA, Appalachian State University

Why selected: Labiak has led by example as Trent Capital's assets under management have grown by more than \$100 million since he joined the company. He is credited with constantly coming up with new ideas, from streamlining custodial services to researching marketing initiatives. Labiak's known for his ability to bring in clients and develop lasting relationships with them, a product of his 24/7 dedication, which has resulted in a 95 percent retention rate during the past 10 years.

Three adjectives that describe you? Organized, witty and reliable

Favorite thing about your job? Researching stocks and working with clients to help them achieve their investment goals

Best way you help your company stay competitive? By always bending over backward to help clients. Responding to emails at 10:30 p.m. or while on vacation, driving to a client's house to help them set up online access and by learning more about their families, travel plans and charities they support.

Favorite volunteer activity? Triad Golden Retriever Rescue and chairman of High Point Elks Swim Team

Best advice received? It wasn't advice in terms of words. It was simply the work ethic my dad passed along to me. He outworked everyone.

Professional goal yet to be achieved? To do what is necessary to make Trent Capital a well-known name in the Greensboro/High Point area. While we will never be able to compete with the advertising dollars that the huge, national firms toss around, we certainly can compete, and win, based on the service we provide, the risk-adjusted returns we generate for our clients and the deep trust clients have developed in the job that we can do.

Financial advice you've given your children or other young people? You have one chance in this lifetime to obtain a guaranteed 100 percent return and it's your company's 401(k) match. Make sure you contribute at least as much as they match.



David Labiak