



**SEASON 3 EPISODE #16**

**CHRISTOPHER ZOOK**  
CAZ INVESTMENTS

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**Gui Costin:** This episode is brought to you by Dakota Marketplace. Are you tired of constantly jumping between multiple databases and channels to find the right investment opportunities? Introducing Dakota Marketplace, the comprehensive institutional and intermediate database built by fundraisers for fundraisers. With Dakota Marketplace, you'll have access to all channels and asset classes in one place, saving you time and streamlining your fundraising process. Say goodbye to the frustration of searching through multiple databases, websites, form ADVs, and say hello to a seamless and efficient fundraising experience. Sign up now and see the difference Dakota Marketplace can make for you. Visit [dakota.com/dakota-marketplace](http://dakota.com/dakota-marketplace) today. What is up, everybody? It's Gui Costin, founder/CEO of Dakota. Welcome to the latest edition of the Rainmaker Podcast. I am so thrilled to have on Christopher Zook, who's the founder and chairman and chief investment officer of CAZ investments. Christopher, welcome.

**Christopher Zook:** Thank you for having me. So glad to be here.

**Gui Costin:** It's awesome to have you. Christopher Zook is the founder, chairman, and chief investment officer of CAZ investments. With over 30 years of experience in traditional and alternative asset investing, he was honored with the Texas Alternative Investments Association's Lifetime Achievement Award. He's a regular contributor to major media outlets and is actively involved in public policy. In 2019, Christopher was appointed by the Governor to serve on the State of Texas Pension Review Board, where he chairs the Investment Committee. Christopher recently co-authored *The Holy Grail of Investing* with Tony Robbins, which became a number one New York Times Bestseller. He is married to his high school sweetheart, Lisa. And their son Christopher is married to Cecelia, and they have two children, Christopher III and Madelyn. Take us back a little bit to

where you grew up, college, and then how you rolled right into creating CAZ Investments.

**Christopher Zook:** No, I'm happy to do that. So, I grew up in Houston, Texas. I went to Texas Tech University to play football and then play golf. Knee injury my freshman year-- long story, we can save that for another time. But took up the game of golf and ended up playing on the golf team there and then moved back to Houston right after I graduated. I started into the brokerage world with PaineWebber and was very quickly recruited to Lehman Brothers thereafter. And then 10 years later, started the firm CAZ Investments. Actually, it was a goal that I set, which we might come back to at some point in this conversation. In 1991, I set a specific goal to start my own firm 10 years later. And nine years and nine months later opened up CAZ, which I don't think is a coincidence.

**Gui Costin:** I know it's your initials, but it's a really cool name.

**Christopher Zook:** Thank you very much.

**Gui Costin:** I'm a branding guy, so it's hard not to remember that. That name just has a great ring to it. So just I'd love to hear just a little bit about CAZ and what your investment focus is.

**Christopher Zook:** Sure. We're a thematic investment firm that is really built around investing our own personal capital. So, we identify a theme. We will find the best risk-reward way to take advantage of that theme. And then we're going to find the best vehicle or partner or investment to really maximize the opportunity. And then we're going to invest our personal capital. And then after that, we're going to open up to our entire network. So, they can choose to partner with us or not partner with us, whatever they choose to do. But we've got \$650 million of our own money, including our firm, our shareholders, our team. My family invested in our own vehicles, and we're the largest investor in everything that we do. So, we have a real key phrase, which is "lead with alignment." And we do that by being the first dollar in and the largest investor.

**Gui Costin:** Wow, that is extremely impressive. So that dovetails perfectly into some of the vernacular that you use at your company. So, as we talk about distribution, a lot of the discussion on this podcast is about distribution and how to raise capital and use a lot of different terminology than most people use.

And I'd love to dig into that a little bit, because I don't want to ask you about the divisions within your distribution team, but your capital formation team. Let's talk about language, because I think language means a lot. And you're really into the details. So, Christopher, could you just tell us a little bit about those words that you guys don't use at CAZ.

**Christopher Zook:** No, it's very many words matter a lot. And the psychology of the words, in many cases, are very much misunderstood by people in the world of distribution or business development, or whatever we choose to call it, because the person on the other end doesn't use those terms in their regular everyday life. And so, the more that we can speak to them in a language that they can be comfortable with, which is our goal, the more likely we are to develop a relationship and develop trust, which ultimately is going to lead to a business relationship. So, we don't use words like "we're going to go pitch somebody." I mean, literally, my head might explode if one of my team said that, because no one on the other end wants to be "pitched." It's just really simple. They don't mind being marketed to. They don't mind being educated or informed. But for somebody to come in and say, OK, well, I'm going to give you a pitch, it just immediately puts people on a-- oh, this feels like, a car salesman kind of thing. No disrespect to car salesman, but historical context, they weren't exactly the most respected in the world of business development or capital formation. And that's changed a lot today. But you think about a lot of the audience that we're trying to market to, they're in their 50s, 60s, 70s, 80s. So that's what they think of. We don't use words like "a deck." It's disrespectful to our own materials. Our team has spent an enormous amount of time putting very high-quality materials together. So, we call it a presentation. We call it materials. We call it informational guidelines as to how we go about doing things, or a white paper or thought leadership or other terms that we're going to be able to use. So, we do call our business development team "capital formation" because that's really what they are. We certainly are developing business. We're not ashamed about that. But we're going to have an elevation of the way that we consider ourselves, which then also elevates us in the mind of the consumer, if you will.

**Gui Costin:** And I do believe everything that you do within a company, if you pay attention, it matters. So, for instance, the design of our office then ends up reflected in our products, if you will. And so, if you hold yourself to an extremely high standard around design, it goes throughout, and you don't compromise. And then words, of

course matter. So, I'd love to hear about your capital formation team and how you go about marketing your investments.

**Christopher Zook:** Well, it's interesting because I made a lot of mistakes at 31 years old when I started the firm after that 10-year goal to do so by the time I was just over 31. And one of the greatest ones that I made-- I made a lot of them. But one of the greatest mistakes that I made is that I believed, because I had a really, really good track record, that if you build it, they will come. And what I learned is you can have the best track record in the world, and you can build it, but they don't come. You have to go actually tell people what you do. And so, in 2013, I had a pivotal moment that was a wake-up call for me. I was at the club that I belonged to in Houston. And a gentleman 20 years my senior threw me effectively up against my locker and got right in my face. And he said, Chris, I am so upset with you. I'll use cleaner language for a podcast here. That's not the word he used. But he said, I'm so upset with you. And I said, look, I don't what I did, but tell me what it is, I'll fix it. And he goes, I heard you shorted subprime with John Paulson. And I said, yes, sir. He goes, why in the "blank" didn't you tell me what you were doing? And I, puzzled, looked at him. And I said, you're not a client of our firm, and you're not supposed to prospect in the locker room. That's a real thing. So why would I have told you this? He goes do not have any blankety blank, blank, blank right to tell me what my family is interested in and what they're not. And I said, you know what? You're right, and I apologize. And from now on, I'll tell you everything that we're doing. You make your own decision. And he's invested in basically every single thing that we have done since that time in 2013. Well, I had never been in that mindset from the standpoint of this business. And so, what we did is, starting in 2014, we tried to follow, the best we could, Peter Drucker's advice. Peter Drucker, the famous management consultant, said business is just two things. It's innovation and it's marketing.

And we were awesome at the innovation. And we were horrible at the marketing. We had none. It was basically me and a few others that were basically just doing it on a referral basis. So, we set out to create a world-class marketing organization. And for our capital formation team, that is what our standard is. And we're going to be the best in the world to the extent we can be at everything that we do, from a positioning of the vehicles we're investing in, positioning our firm, elevating our brand, all of those kinds of things, in order to be able to deliver results for investors, and to differentiate ourselves from the rest of the street.

**Gui Costin:** So, what did you do to build that team going from great innovation-- no distribution, if you will, to now, the capital formation team today?

**Christopher Zook:** What I did is, I went back actually in my own personal history, and I looked at what I was very successful at doing when I was at PaineWebber, and then Lehman Brothers and then Prudential, and then Oppenheimer, before I started the firm, because I was obviously in a distribution role then. I was also on the money management side. I manage the portfolios. But I had to go out and get clients. So, I went back and said, OK, let's figure out how to apply the best practices, avoid the worst practices that I saw, take the best practices, and apply it to a completely different type of positioning, if you will, in the marketplace. And so, we literally built it out for almost a year and a half. I really went through about, OK, what was good about what we did, what was not good about what we did. And then we started effectively hiring people to fill specific roles in capital formation in 2016. And I knew what I was looking for, and it was therefore hard to find it. But once we found them, we brought them in as kind of a class. And the class of 2016 was the first step to what then was the class of '18, the class of '20. It wasn't designed to be two years apart, but it was really helpful. And this is for a lot of the people in the audience. It's really helpful when people in the world of capital formation, business development, they join at the same time because they're all going to be in the same place. And they can lean on each other, and they can practice together. And they can go out and encourage each other at a different place than somebody who's five years in the business or 10 years in the business. And so, we've followed that approach. It also allows us to really chunk the time to really focus on training and development, while we have those people all at a very critical junction in their career, and specifically in their career with us. So that's how we have done that, and we've continued to develop it over time-- figure out what's working, what's not working, get better and constantly optimize. And then from there, we've developed more geographies, and we've continued to just grow it organically. As a firm, we've never made acquisitions. Back in 2004, we kind of did a lift-out of one person, but I don't consider that really an acquisition. But in this situation, we have gone from 2013-- we were \$350 million in assets under management, and we have done 100% organic growth. And now we're at \$9.2 billion in assets under management because we actually focused on marketing.

**Gui Costin:** So obviously, there's a process in here for your capital formation team. Can you talk to us about the process? I mean, obviously, I wrote the book *The Dakota Way*. I couldn't be more into process and repeatability and focus on what matters most. Could you tell us how you thought about that and created your process?

**Christopher Zook:** There's no perfect process. There's no perfect system. The best system, as we've all heard, is the one that people will actually follow, and the one that they will do. So fortunately, in what we do, because our vehicles are so differentiated and so exclusive compared to what most people are able to get access to, it does give our team a very significant advantage. I mean, ultimately, if you can go to somebody and say, you can't get this anywhere else in the world, but you can get it here-- do you want it or do you not, that's a very effective marketing presentation. But you still have to have a process. So, for us, we measure how many outbound contacts somebody is making. We measure how many meetings they're holding, how many presentations they are giving, how many times they ask for the order, how much their closing rate is, what the average order size is, and how frequently it is that they get referrals, and then what the conversion rate is on those referrals, and then ultimately how many lines they have with someone. And whether it be somebody marketing to advisors or to individuals, we all know the stats that are watching this podcast. If you only have one line with somebody, rough numbers, a year later, you have a 50% chance of getting more opportunities or more business with them or keeping that client. If you have two lines, it jumps to about 80%, so it's a drastic jump. At three lines or above, it's over 90% probability you're not only going to keep the client a year later. But you're actually going to have more ongoing relationship, more new business from the same investor. And then ultimately, referrals come from that. So, what we do is break out our capital formation team into three pillars. Number one, go get new investors. Number two, go get more money from the existing investors. And number three, make raving fans of our investors and our team. And everybody focuses on that.

**Gui Costin:** Yeah, so give me-- I love that. But let's talk about the "raving fans" part. I know it comes down to communication and interaction and sharing of information. So, can you talk to us about that? Because at the end of the day-- I mean, the raving fans part. All right, I'm just going to say, I think the bar is very low in the world of business for communication responsiveness. So, starting with the bar is low-- even just a little TLC, you're doing well. But if you can

actually, do it up here it's a game changer. And I'm sure that's what you guys have been doing.

**Christopher Zook:** We certainly can do better. And we're always striving to get better. But I think we do a good job. I don't want to say that we're outstanding at it. We've grown so fast that one of the easiest things for any capital formation team, when they're growing really, really fast, is they just are so focused on pillar one of going out and getting new ones. But the depth of the relationship of obviously getting more from them, getting more lines and the relationship that is there, really is just so critical.

We tell our team we do not want to be transactional. We want to be relational. And the only way that happens is actually investing time, just like any other relationship. To your point, it is so true, the best time to build a business is in a bear market in the industry that, obviously, we're involved in. So right now, the markets have been getting a little bit wonky over the last couple of weeks. And those people that are hiding under their desks and just hoping the phone doesn't ring, you're going to lose. It's that simple. If you're going to get on the phone and say, here, look, I don't know exactly what's going to happen in the world, but here's what we're saying, here's what we're thinking, how can I serve you, how can I lead you to a path that gives you comfort-- well, then that ultimately stands out more than anything else.

In COVID, the ultimate stress test as an example, we had a weekly, if not multiple times a week webinar that we did for investors to where, look, here's what's happening in the markets. Here's what we're hearing from our contacts in the health world. We don't know what's going to happen, but here's what we're doing with our personal capital. Here's what we think that other people should be doing. And here's what we're trying to do to take care of our loved ones. That is so different than everybody else who is just trying to figure out how to hunker down and just let the storm pass. So overcommunication, consistent communication, and when it gets stressful, being proactive, not reactive, those are difference-makers.

**Gui Costin:** I love it. I do want to just come back, because I want to get to the CRM question, just how you track everything and the importance of that. But I do want to come back to your three pillars because your first pillar is new. And you were making a point that it's just so important to try to get more investment from that client. I get that. But it seems that your whole process is focused so much on the new, and that's such a critical muscle to have in a business. And I get that you want to do two and three equally. But that means basically,

you've set it up to focus on what I think is the most important thing, is a culture of the new. And by the way, I love that. As I said to a lot of investors, call an investment firm, well, we kind of market a little bit, we do this a little bit. Well, if you called on a company and you wanted to make an investment, and they're like, well, sometimes we're going to do sales, but we're just going to shut it down for six months, I'm like-- but you get that in the investment business where they're like, no, no, we're not going to get a market. It's like, no, no, that has to be a huge muscle that you build. And I'd love to just hear your thoughts on that.

**Christopher Zook:** We focus on it extraordinarily intentionally. And we measure it. And the old adage is so true. You can't manage what you can't measure. And you must have metrics that matter that you measure. So, we really apply that. And what we have actually done-- I coached high school football for four years. I played football in college until my injury. And so, I think as a football player and as a football coach. So, we actually look at the pillars and the way in which we operate our day. We break things down into offense, defense, and special teams. And we all know that defense wins championship. But a whole lot of special teams, mistakes can cost you a lot of games. So, we look at it from that perspective. And our offense is obviously going out and getting new business. Getting new relationships has to be a critical component of that, because if a business is not growing, whether it be the firm that you work for or your business within the business-- which is what we tell our capital formation team. You're managing a business within a business. You have to think like an entrepreneur. You have to always be focused on how you can make your business more successful. If you are literally not growing, you're dying. It's that simple, because in the financial markets particularly, people do pass away, and people do get sick, and they do have to make changes in their situation. And if you don't have a relationship with new investors that you're constantly cultivating, you're going to lose eventually. It's just a matter of how long it takes you to run off what you currently manage.

**Gui Costin:** I love it, I love it, OK, I could spend two more hours talking to you about that. But in CRM, tell us, how you think about a CRM, and how you utilize one.

**Christopher Zook:** Yeah, so not a plug for Salesforce. But we were some of the earliest Salesforce adopters. We started in 2005 with Salesforce. And what I'll tell you is that Salesforce is such an amazing tool because it can do everything. And, oh, by the way, it's such a

challenging tool because it can do everything. So customizing Salesforce, or any other CRM, to be able to do what you need it to do, and not overwhelm your team, is really, really important for all the leadership there. It goes back to the same thing I said earlier. The best system in the world doesn't matter if nobody uses it. So, you have to have a system that people will adapt and that they will comply with what needs to be done, not just from a compliance standpoint, but also from a business functionality standpoint. I mean, if somebody needs to transition between-- Mr. Jones goes from one person to another person, you have to have great notes in there. So, all that to say, we try to make it as easy as we can for our team to be able to get everything into Salesforce. But then we also use the incredible power of reporting to be able to have dashboards that show us exactly how people are doing, what activities there are, that kind of thing. I'm a meritocracy person. I'm all about competition. So, when I was at Lehman Brothers, it was really simple. You walk to the front of the room, and everybody saw what everybody else was doing. We take the same approach. Literally, we have a dashboard that goes out, feeds into Power BI to make it a little bit prettier. And it shows every single person in capital formation, where they stack rank against their peers in how much new business they're bringing in, the average order size, which is a big deal for us, and then how responsive they are to leads that come in from the outside. And we're fortunate, we have a lot of inbound lead flow. We actually have more inbound lead flow sometimes than we have time to call. And I'm not saying that tongue in cheek. I mean, it's a real problem. It's a blessing and a curse. We have to call those people, so we don't look bad. But it's also a blessing because our team has all this inbound stuff coming at them. But you've got to be responsive. You can't let it sit there for three days before you get back to somebody who's taken the time to reach out. So, we measure those specific things, and we also have our team divided into east and west. And we love it when they compete. And we set it up for them to compete east versus west. It's a team sport, obviously an individual sport to a certain degree. But we try to look at everything. We win and lose as a team. That's another one of our promises.

**Gui Costin:** Again, love everything about this. Love Salesforce. Couldn't agree more. I can't ask any more questions. You answered it so thoroughly and perfectly. Again, remember, our listener doesn't necessarily always believe in the power of a CRM and how it can 10x the leverage of a salesperson. So, hearing from you go through that in such detail is great. So, I don't want to end this because not many people write a book with Tony Robbins. So, could you just give us a

minute? Congratulations, it's a bestseller. How did you get there. How did you-- obviously, that must have been a goal, or something. So, can you tell us how that all went down?

**Christopher Zook:** It's amazing because I did set the goal in 1991 while I was listening to the tape series on a cassette tape-- for everybody who remembers what those were, on a cassette tape, listening to Tony Robbins and his 30 Days of Personal Power. I've always followed Tony. I went to my first live event in 2014 when I realized that I had to go out and build a marketing machine to be commensurate with our innovation that we were doing. And so, I went to a program of his called Business Mastery, totally revolutionized the way we were doing business. In 2019, Tony actually became an investor with us because of an introduction from somebody that used to work for Paul Tudor Jones. And Tony's relationship with Paul Tudor Jones is very well documented. But so, this gentleman introduced us to Tony and Ajay Gupta, who runs his family office. They became an investor. I had nothing to do with it. And after they became a client of the firm, they looked at it and go, we love what you're doing, particularly in the world of GP stakes, et cetera. And we really want to learn more about you. And they didn't know anything about my history with Tony. And I've literally said this on many, many other forums. Other than my faith, and other than my wife, nobody's had more of an influence on my life than Tony Robbins. They had no idea of that when they invested with us. Tony said, after he learned that, I want to meet this guy. After a 13-hour meeting at his home, we decided to form a partnership. He bought in with the GP Stake firm. He actually bought a GP Stake in our firm. Nobody took any money out. It was all there for growth. And we decided at that time to write the book together. And it was a fascinating opportunity to not only build my relationship with Tony, which was really pretty close at that point anyway, but we were in constant communication. It was truly a collaborative effort, with both of us bringing our skill sets to the equation. We rolled that out. Obviously, it was a lot of fun. It was a ton of work. But it was a lot of fun, and so thankful for that opportunity.

**Gui Costin:** Congratulations. It's not easy to pull off. We know that. Procrastination creeps, in addition to everything else you're doing. A lot of stuff gets in your head along the way. So, for anybody listening, I strongly encourage anybody to write a book, because it's not just about writing the book. It's about going through that process and completing it, which a lot of times can be your life's work, if you will.

OK, I have three closing questions. I mean, I love your style. So, talk to me about how you would characterize your leadership style.

**Christopher Zook:** Leadership style is a football coach. I mean, most of what I learned about leadership, I actually learned from people that were coaches, not from people I saw in business. There's a lot of great leaders in business. But when you start talking about the legendary coaches, for college football in particular that I had the opportunity to learn from when I was a high school football coach, it was amazing. My leadership style, if you summarize it to that extent, we expect excellence. We know what athletes are capable of doing. And if they're not willing to do that to the extent that they can because of effort, well, then they're not going to be on our bus very long. If they're really, really putting forth the effort, and they just need to develop their skills, well, then we're going to invest all the time in the world. There's not a coach out there that, if somebody is a lazy butt, is going to stay after practice and help somebody get better. But if somebody is grinding it out, always working hard, doing it with great intentionality and with a great attitude, they'll work with them all day long. I'm exactly that same way. And we drive our team. And I mean we drive our team to excellence because we know they're capable of so much. And we want them to be the very best version of themselves that they can be.

**Gui Costin:** This has been your-- I love it. Advice for a young person getting into the capital formation business today-- what advice would you give to that young person?

**Christopher Zook:** There are only two things that differentiate people from others. Literally two things-- hard work and attention to detail. Nobody wants to hear that in the world of capital formation or business development, but it's true. If you go out and you send an email to somebody, and it sucks-- sorry to be blunt. But if it sucks and it's got typos in it, you're done. You're not going to get to the next meeting. So do what you say you're going to do, when you say you're going to do it. Do it with excellence. Pay attention to detail and then work your absolute tail off. And that is definitely a formula for success.

**Gui Costin:** Details matter. I mean, I'm just such a big believer in that the little things all add up. So last question-- what is the biggest challenge you're facing in the market environment or in your business today?

**Christopher Zook:** It's funny, Gui. I actually asked that question of almost every person that I meet with, what is the greatest challenge in your business today-- not necessarily problem, but the greatest challenge. In our world, it is absolutely easy to say, our team is so busy, the whirlwind will eat up everything that somebody has available to be able to apply to their role in capital formation in particular.

So, it's so critical for us as a business, and for each individual in our business, to focus on what is important, not necessarily what's urgent, because that's what really drives things forward. That's what allows people to have a step change. To go from here to way up here is those really meaningful, big-time opportunities that just get lost if people are just focused on the trees. It's another one of our promises. Focus on the forest, not the trees. Find what matters. And in many cases, it is not at all focusing on the biggest opportunities. It's just focusing on the opportunities that are right in front of us, so trying to get our team and our business to be able to really stay focused on what is going to move the needle. Every single investor matters. We're going to respect them and we're going to make them a raving fan. But some investors are going to have a cap. And other opportunities, Investment advisors in particular, can be very, very, very large. We want to make sure people stay focused on that.

**Gui Costin:** So, the quadrant-- I'll just focus on two of the urgent and the important, we all know that. That's getting done. That's happening every single day. I've always felt the growth of a business is, if you can focus on the important, but not urgent, that's where the gold is. I think that's what you're getting at. I mean, if that's part of your culture, that's an unbelievable thing, because that's really something that's so far beneath the surface for most people. Just acknowledging those two buckets-- those two quadrants you want to stay from.

**Christopher Zook:** And for those that are not familiar with it, it's the 7 Habits of Highly Effective People from Stephen Covey. And we actually go even further with that, which I think will build upon my answer. We actually look at every single thing-- is this a boulder, is this a rock, or is this a pebble or is this sand? So, we actually added a fourth quadrant, or a fourth category, if you will, which is boulder. This is so important, you can't move this thing. You have to do it. That's a boulder to us. And then big rocks first. Then you can get to the pebbles. And then you can deal with the sand whenever you get around to it.

But most people in business development, in the old days, when we first got in the business, everybody shuffled papers on their desk. Now everybody just stays in email and surfs the internet or ask ChatGPT something new. It's all about what is wildly important that I can focus on that's going to move the needle that is not necessarily urgent. As you put it-- I love the way you put it, that's where the gold is.

**Gui Costin:** Christopher, I can't thank you enough, man. This has been unbelievable. And typically, actually, I'm much more involved. But I'm just listening so intently, because I would characterize your business has been built with such clear intent around core principles that matter most. It's so evident. And your enthusiasm, your energy is unbelievable. So, I can't thank you enough for being on the Rainmaker Podcast.

**Christopher Zook:** Thank you for having me. It was a lot of fun.

**Gui Costin:** Great. All right, everyone, that's a wrap. Another classic Rainmaker Podcast. And we can't wait to see you on the next Rainmaker Podcast.

**Announcer:** You can find this episode and others on [Spotify](#), [Apple](#), or your favorite podcast platform. We are also available on [YouTube](#) if you prefer to watch while you listen. If you would like to check up on past episodes, check out our website [dakota.com](#). Finally, if you like what you're hearing and seeing, please be sure to like, follow, and share these episodes. We welcome all your feedback as well. Thank you for investing your time with Dakota.

**Gui Costin:** Hey, thanks so much for joining Rainmaker Podcast. Hope you enjoyed the show, enjoyed the interview. I know I loved it. And hey, if you wake up in the morning, and you raise money for an investment firm, you do cold outreach, whether you're a sales leader or salesperson, and you don't about Dakota Marketplace, we would love to show it to you. It's world class. It's used by over 880 investment firms and over 3,600 individual salespeople. To learn more, go to [dakota.com](#), and click on a free trial.