

Meet Pat Isaac, CEO at Capital Services

Jim Ries: Hello and welcome to Java with Jim. I'm Jim Ries, Director of Business Development at Offit Kurman. Joined here today with my friend Pat Isaac, CEO, at Capital Services. Pat, how are you today?

Pat Isaac: I'm great, Jim. How are you? It's so good to see you.

Jim Ries: Doing great. Love the logo behind you.

Pat Isaac: Thank you.

Jim Ries: That's beautiful. So Pat, tell us about Capital Services. What do you do at Capital Services and what makes your company different from other companies in your industry?

Pat Isaac: Well, we're an independent boutique firm that's WBENC certified. We're also woman owned. But we work and focus on employee benefits, HR, recruiting, executive compensation, mergers and acquisition, human capital variation projects and things like that. So, I mean, our key differentiators, Jim are that we really solve root problems, not symptoms.

Our integrated approach and the way that I have built the organization [00:01:00] is it all builds on itself, but it's always about people at the end of the day.

Jim Ries: Love that. You used the term integrated approach. Can you expand on that just for a minute?

Pat Isaac: Yes, absolutely. One of the things that was really important to me is, I saw so many different silos in so many different industries.

And so then what I did is I started out in the employee benefit world and I've known that world for 30 plus years. And when people referred to benefits, they refer to really HR. Okay. That's how they relate to it. So I started noticing that organizations out there didn't have a budget for the expense of having really experienced HR people. And so what I did is I started employing just, CHROs, very high level HR individuals that are experienced, smart, and could get the job done much quicker. And then from there we started getting [00:02:00] requests, oh, could you hire an HR person for the organization?

So that's where the recruiting area started coming in. Simply because it's a world that we know well, and we know what capabilities need to go there. And then once we have those people, how do we hold 'em down? And that's where the executive compensation executive benefits actually came in.

It will continue to grow. We saw a lot of mergers and acquisitions and so we became the transition team for many PE companies, many large organizations throughout the U.S. But the model continues to evolve as the needs evolve within the industries.

Jim Ries: Got it. Thanks for that explanation. So Pat when it comes to Capital Services, what are you most proud of?

Pat Isaac: Can I share a story? 'cause I think that that's, very meaningful. So this is really what changed my life. There was an employee who couldn't afford to really be sick. That was so unfortunate. And so, [00:03:00] several years ago when an employee came to me, not from our firm, from our client company reached out to me privately. Her child really needed medical care. She was terrified, Jim. She couldn't go to the doctor because she was afraid that, she couldn't afford the deductible. And then, she said, I feel like I have to choose between getting my child's care and keeping the lights on.

And it just hit me like a rock in a way that I couldn't forget. From there, it gave me that mission, that purpose to say no family should ever be put in that position again. Not when employers are spending millions every day on healthcare, and it's still unaffordable for people to use.

So what we did is we put our heads together and we started redesigning the companies and organizations like their entire plan structures so that we were able to bring in care at their fingertips. Direct primary care. We reworked like different pharmacy strategies.

We [00:04:00] removed a lot of the financial barriers that actually keep people from getting the care that they need. And we were able to really put meaning back into what healthcare is all about. And that has been my driving force every day. It's not about working in the insurance business, but it's about protecting people from, financial crises and also giving their families peace of mind that they're not gonna go bankrupt if they get care.

Jim Ries: Love that. Thank you for sharing that story very meaningful.

Pat Isaac: Absolutely.

Jim Ries: So Pat, what do the next six months look like for you and Capital Services?

Pat Isaac: Yeah, so, we're scaling fast and it's all by word of mouth. We have a lot of ambassadors throughout the country because of the work that we do.

So, we'll continue to expand across the country in all disciplines. We are in really an acquisition mode. So across the country, many of my peers are beginning to retire, so we'll continue to acquire. Basically, it has everything to do with people, the culture [00:05:00] and the call strategies that we put in place.

We'll continue to build solutions around solving problems every day.

Jim Ries: Sounds like some exciting times ahead for you for 2026 and beyond. Pat, here's the fun part. What do most people watching this video not know about you?

Pat Isaac: So, I know I've said it before, but Pat Isaac was actually in a rock band, and I was the lead singer, many years back. So that is something that probably a lot of people may not know

about me. But ultimately, beneath this CEO title that I have, I'm simply a woman who believes in dreams, gratitude, and living life to its fullest intention and purpose.

Jim Ries: Love it. And thank you for sharing that fun fact.

I think you're right. Most people watching this, I know that about you. Great to chat with you today. I'm sure I'll be seeing you around in the next few [00:06:00] weeks, so you take care. Thank you for joining me.

Pat Isaac: Great. Thank you, Jim. It was truly a pleasure.

Jim Ries: You bet.

Pat Isaac: Appreciate it.

Jim Ries: Bye.

Pat Isaac: Have a good day. Bye.