



Tuesday, October 20, 2020

CAPTRUST Wealth Management Services Overview

CAPTRUST provides investment advisory, asset management, and planning services to thousands of affluent private clients.

For wealth management clients, CAPTRUST offers a best-in-class experience, thanks to the firm's centralized model, which is supported by highly specialized talent with deep expertise. Tune in to see the suite of resources CAPTRUST's wealth advisors have available to them— from industry-leading cybersecurity and centralized trading to performance reporting tools and wealth planning technology like WealthView.

Legal Notice

This document is intended to be informational only. CAPTRUST does not render legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2022 CAPTRUST Financial Advisors