



Advisor RFPs: The Ultimate Guide (Webinar Recording)

With a history of responding to more than 3,500 RFPs and having helped shape the industry's standard response template, the CAPTRUST team is uniquely qualified to help you streamline this process. In this recorded webinar, we provide a comprehensive, step-by-step framework to help you plan, prepare, and successfully execute this important task. The discussion also covers:

Best practices for advisor RFPs

- The influence of recent legislation and new technologies on the retirement sector
- Key questions plan sponsors should consider based on their specific plan types
- Current and pressing topics for retirement plan sponsors today

Additional Resources

[Webinar Presentation Deck](#)

[Industry Standard RFP Advisor Search Template](#)

[Selecting and Monitoring Pension Consultants](#)

To download a copy of the transcript, [click here](#).

Legal Notice

This material is intended to be informational only and does not constitute 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. It may not apply to all investors or all situations 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.

© 2026 CAPTRUST Financial Advisors