



Executive Benefits for Plan Sponsors

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Your most senior employees often have complex compensation and benefits, which aren't well served by one size fits all financial wellness solutions. Today, we'll discuss what CAPTRUST at work can do for your key employees. As one of the country's leading retirement plan advisors, CAPTRUST has decades of experience in complex employee benefits. We understand that financial wellness means so much more than just retirement assets. That's why our executive services, available through CAPTRUST at work, include advanced financial planning, executive compensation planning, and more.



Company stock planning, concentrated position analysis, tax optimization, legacy planning and wealth transfer, risk management and insurance assessment, and business succession planning. We help your employees maximize their chances of success and minimize the risks of accumulated wealth. CAPTRUST at Work for Executive Employees includes on demand support. From a dedicated financial advisor who is familiar with your organization's qualified and non-qualified plans, stock programs, and executive compensation.

Through one-on-one meetings, our advisors can address timely questions and help your key employees develop financial goals and plans tailored to their unique needs. They can also create retirement income and wealth projections that help your key employees visualize their financial future. So that they can make better informed decisions all along the way to retirement.

As the benefit sponsor, you can determine the number of key people that receive this service for a flat annual fee. CAPTRUST will meet with your key employees in person or virtually using video and screen share technology. Your chosen employees will also have access to CAPTRUST's industry leading financial wellness content, including Vested Magazine.

While we believe all employees can benefit from tailored financial advice, your most senior employees often need extra help to navigate their complex financial situations. For those who are interested, CAPTRUST can also deliver discounted comprehensive wealth management services, which would include ongoing discretionary asset management and implementation of all financial planning recommendations to help them grow and guard their wealth.

To learn more about this valuable financial planning tool and the impact it could have on your key employees, contact your financial advisor or visit CAPTRUST.com today.

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