



9. Check your family's healthcare proxies, living wills, and other advanced directives to ensure they are appropriate.
10. Take inventory of your important documents to be sure that you and your loved ones know where they are saved, preferably with electronic access to digital copies.

It can be tough to keep cool when you see the market dropping or to control your exuberance when you see it shooting upward. The simple fact is that market volatility is a part of investing, and we can count on market swings to challenge our patience as investors. So it's important to keep a long-term perspective. Overreacting to market movements or trying to time the market by guessing its short-term direction is risky and may negatively affect your long-term portfolio performance. Don't panic, stick to the plan, stay invested, tune out the noise, and focus on the long term. Your sound investment strategy should carry you through market ups and downs.

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