



High Impact Retirement Plan RFPs (Webinar Recording)

The discussion covered insights on recent trends in advisor searches, common pitfalls plan sponsors face, and best practices for evaluating proposals with confidence. Attendees will leave with actionable guidance to help streamline the process and select an advisor aligned with their plan's long-term goals.

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

Additional Materials:

[High Impact Plan RFPs Presentation](#)

[Request for Proposal \(RFP\) Retirement Plan Advisor Search](#)

[Selecting and Monitoring Pension Plans: Tips for Plan Fiduciaries](#)

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.

Â© 2026 CAPTRUST Financial Advisors