



## CAPTRUST Institutional Services Overview

CAPTRUST's retirement plan clients benefit from the firm's centralized model, which is supported by a deep bench of highly specialized talent. Learn about the suite of resources CAPTRUST's institutional advisors leverage to create a best-in-class client experience, including investment manager due diligence, customized participant advice, vendor analysis, and the latest in cybersecurity.

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.

Â© 2026 CAPTRUST Financial Advisors