



Estate and Legacy Planning (Webinar Recording)

Whether you're in the early stages of your estate planning goals or looking to fine-tune an existing plan, this webinar offers actionable insights to help you craft a successful estate planning strategy. Explore the key elements of estate planning and learn how to protect what you've built for future generations.

Topics covered include:

- determining what's in your estate and its potential value;
- understanding how probate works and strategies to avoid it where possible;
- identifying who you want to impact and when to distribute your assets; and
- creating a customized estate planning strategy to meet your personal and financial goals.

Additional CAPTRUST Resources

[CAPTRUST Estate and Legacy Planning Webinar Presentation](#) (downloadable PDF)

[The 25 Documents You Need](#) (downloadable PDF)

[10 Tips for Estate Planning](#) (video)

[Valuation Discounts for Gift and Estate Tax Savings](#) (article)

[An Introduction to Estate Planning](#) (article)

For 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