

What's on the menu for your retirement plan? (Webinar Recording)

Effective investment menu construction hinges on simultaneously allowing for the diverse financial needs and sophistication of plan participants and maintaining a reasonable number of core options. Done well, an attractive menu of investment options and account management programs can enable plan participants to feel confident in the tools they have and prudently invest their retirement savings.

Moderated by Defined Contribution (DC) Manager <u>Pete Ruffel</u>, our panelists cover a range of topics from capital preservation to retirement income as they discuss the lineup of today and that of the future. You will also hear about DC investment menu approaches, benchmarking, and trends.

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

Page 1 June 22, 2023



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.

© 2025 CAPTRUST Financial Advisors

Page 2 June 22, 2023