Navigating Financial Mattersâ?¦ Together (Webinar Recording)

This webinar recording begins with CAPTRUST Chief Investment Officer Mike Vogelzang sharing the latest on markets and volatility as we move towards the end of the year.

Then, CAPTRUST Head of Wealth Management Eddie Welch discusses family dynamics in financial decision-making with New Orleans-based Principal Andrew Wisdom and Legacy Capitals Consultant Kristen Heaney. Itâ??s common for one person in a relationship to take the primary role in financial decision-making. But this dynamic can be detrimental if the other partner is completely disengaged.

Whether youâ??re a husband, wife, child, or other family member, this webinar recording is designed for all people who are navigating financial decisions together and will highlight:
â?¢ how to engage a partner in financial discussions when they are uninterested;
â?¢ the importance of assembling your financial roundtable; and
â?¢ ways to merge multiple viewpoints on money.

To download a copy of the transcript, click here.

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