



Navigating Financial Matters 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. It'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 you'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:

- how to engage a partner in financial discussions when they are uninterested;
- the importance of assembling your financial roundtable; and
- ways to merge multiple viewpoints on money.

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

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