



## Ways to Strengthen Your Estate Plan (Webinar Recording)

You've spent decades planning, saving, and investing, so that you and your loved ones can live comfortably. Chances are that you have an estate plan in place as well. But, when was the last time you reviewed it for outdated information or missed opportunities?

Listen to our panel of experts on risk management and legacy planning, featuring Elie Foy, an estate planning attorney at Wyrick Robbins Yates & Ponton LLP. This estate planning check-in covers

- the top five documents to include in your estate plan,
- the most overlooked aspects of estate planning, and
- important questions you should be asking about insurance.

This webinar recording begins with an update on current market conditions from CAPTRUST Chief Investment Officer [Mike Vogelzang](#).

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.

© 2025 CAPTRUST Financial Advisors