



CAPTRUST Wealth Management Services Overview

CAPTRUST offers a best-in-class client experience, using local financial advisors with highly specialized expertise and supporting them with centralized, nationwide resources. In this video, learn about the suite of resources CAPTRUST wealth advisors have available to them—from industry-leading cybersecurity and centralized trading to performance reporting tools and wealth planning technology, including our proprietary planning software, WealthView.

Video Synopsis — CAPTRUST Wealth Management Services Overview

What sets CAPTRUST apart? In this in-depth overview, leaders and advisors from across the firm share the infrastructure, values, and team dynamics that power the CAPTRUST experience.

1. Built Around the Client, Not the Company

CAPTRUST was designed from the ground up to work backward from the client's needs. Rather than fitting clients into a one-size-fits-all model, the firm built its platform to support advisors in solving real financial challenges, with tools and resources tailored to individual goals.

2. Centralized Strength, Local Expertise

While each advisor is a local expert, they're backed by a nationwide bench of over 700 professionals specializing in trading, research, operations, performance reporting, and financial planning. This centralized model ensures consistency and efficiency while allowing advisors to focus on what matters most—client relationships.

3. Comprehensive Resources Under One Roof

From best-in-class planning software (WealthView) to a robust client services team, CAPTRUST brings together the technical, operational, and human expertise needed to support complex financial lives. Specialized teams cover everything from U.S. and international equity research to trust and estate planning.

4. A Culture of Ownership and Continuous Improvement

Every CAPTRUST employee has the opportunity to be an owner in the firm, fostering a culture of shared accountability and long-term commitment. As Rush Benton explains, clients benefit when they’re working with someone who owns the business—because that alignment drives better service and results.

5. Investing in the Future

CAPTRUST reinvests half of its earnings annually into the business, fueling innovation in technology, cybersecurity, and client services. This approach not only ensures resiliency through changing markets—it also keeps the firm positioned at the forefront of the industry.

Key Takeaway:

CAPTRUST wealth advisors aren’t operating in isolation—they’re part of a deeply connected, highly resourced team built to deliver confident outcomes and exceptional client service. This video illustrates how scale, specialization, and culture converge to create a standout wealth management experience.

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



CAPTRUST

express written permission of CAPTRUST: 919.870.6822.

Â© 2026 CAPTRUST Financial Advisors