

*Please note: This is a transcription so there may be slight grammatical errors.*

*Under the Investment Advisers Act of 1940, this video is defined as an advertisement and includes an uncompensated testimonial by a CAPTRUST client. However, CAPTRUST pays for travel and accommodations for clients who have traveled to Raleigh, NC in order to participate in this video. Please be advised that clients' experiences as described in the video do not necessarily represent the experience of other clients.*

(00:24):

In 2016, we decided to sponsor our own plan and to retain CAPTRUST as our 3(38) Investment Manager. The fact that we now have designed our own plan with CAPTRUST guidance, and I know that it's full of strong performing assets that perform well among their peers, even during times of extreme market volatility, gives me great comfort to know that we've got a good product out there for our employees and all of our planned participants.

(00:53):

All of the educational materials that they offer, and the one-on-one sessions that we're going to get with the CFP for any of our planned participants lets me know that regardless of where people are in their career, in their life, whatever they have going on, they're going to have access to the same type of quality advice that the most wealthy people typically get. Even for our most senior attorneys who have their own financial advisors outside of our 401(k) program, CAPTRUST has been a resource for them in giving one-on-one advice and taking a second look at other IRA accounts that they have rolled over their 401(k)s into and they've helped to give them that second set of eyes on their retirement plan.

(01:41):

It's a really good feeling knowing that all of the effort you put in to sponsoring your own plan will have a benefit to all of our employees and isn't just another routine run of the mill benefit. We've got great investment advice coming in and that our plan is going to do well for people over the decades.

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