

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

Eddie Welch:

Significant wealth brings its unique opportunities, but also sophisticated needs. At CAPTRUST, our suite of family office services is designed to help you navigate the complex world created by your wealth, so you can focus on what's most important.

As an independent and objective financial advisor, we provide meaningful advice and proactive guidance to help you anticipate your family's needs. Our tailored solutions are designed to simplify your financial life, create a clear path to achieve your goals, and perpetuate your legacy. CAPTRUST guides many individuals, families, and business owners through the complex process of accumulating and protecting their wealth. With a multidisciplinary team of professionals, our firm has unique capability to help you make well informed wealth planning, tax, insurance, and investment decisions. We also understand that family wealth is about much more than money. We use an integrated approach to assist you in reaching your family's objectives for today, tomorrow, and future generations with an emphasis on funding life goals, managing risk, and optimizing investment management.

When it comes to funding life goals, we go well beyond net worth tracking and cash flow planning to include wealth transfer strategies, next generation education and development, lending options, bill pay, and other advanced planning services. We also believe that comprehensive wealth management requires a coordinated, sophisticated, and proactive approach to tax planning that aligns with your financial objectives. Beyond tax preparation, our team can consult on wealth preservation strategies, charitable giving, tax strategies for investments and businesses, asset transfers, and more.

Risk management and the protection of your wealth is another critically important part of our process. We will help with insurance policy evaluation and healthcare planning. We can also work with your trust partners to ensure that all trust related directives are followed. And we offer additional services to help clients tackle the risk of the modern world, including access to a cyber security and privacy firm to provide peace of mind in an increasingly dangerous online environment.

Investment management for ultra high net worth families requires in-depth experience, skill, and resources. At CAPTRUST, our investment platform delivers differentiated and customized investment opportunities. We develop personalized and creative portfolios that suit your needs, incorporating your tax picture, personal values, return considerations, concentrated positions, and hedging strategies to deliver more predictable and desired outcomes. We can also provide solutions for income generation, such as high quality asset opportunities within niche investment strategies, and we offer access to growth opportunities beyond their traditional public markets.

CAPTRUST was built on the premise that investors are best served by advisors who are motivated to focus exclusively on the best interest of their clients. This commitment to independence and transparency has enabled us to grow from the vision of our entrepreneurial founders to become one of the largest independent investment advisory firms in the country. Our depth of experience and unique perspective are the result of more than 30 years of advising to corporations and wealthy individuals. Enjoy the peace of mind that comes from aligning your family's financial success with a dedicated and skillful partner focused solely on your best interest. If you're ready to get started, reach out to CAPTRUST. We're here to help.

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