

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

Your most senior employees often have complex compensation and benefits, which aren't well served by one-size-fits-all financial planning solutions. In fact, a PWC survey shows that three out of five employees experience moderate to high levels of financial stress and nearly half of those individuals spend three or more work hours a week distracted by personal finances. So how can you help reduce the stress and lost productivity of your executives while also providing a tailored benefit that they will truly value? CAPTRUST Blueprint Pro Service is designed to relieve financial stress on your key employees by delivering high quality, objective financial advice to address their unique needs. Blueprint Pro helps to optimize your key employees' corporate benefits, including restricted stock, stock options and non-qualified benefits. The program also helps them to maximize their retirement savings and manage the considerable financial risks associated with accumulated wealth. The service provides access to on-demand advice from an experienced CAPTRUST financial advisor who will guide your employees through the process of creating a personalized financial profile on our client portal, WealthView. This profile will allow them to see their income, investments and corporate benefits all in one place and will help bring clarity to their complicated financial lives. CAPTRUST advisors can offer in-depth advice on everything from company stock planning and tax efficiency to asset allocation analysis and life event funding. As the benefit sponsor, you can determine the number of key people that receive this service for a flat annual fee. This includes access to one-on-one wealth planning and investment advice from a credentialed financial planning advisor. CAPTRUST will meet with your key employees in person as appropriate and virtually using video and screen share technology. Key employees will also have access to CAPTRUST industry leading financial wellness content, including "VESTED" magazine. While all of your employees can benefit from CAPTRUST's conflict free financial advice, Blueprint Pro allows your key individuals to maximize the generous compensation and benefits you provide through a unique resource they will truly appreciate. For those interested, CAPTRUST can also deliver discounted comprehensive wealth management services, which would include ongoing discretionary asset management and implementation of all financial planning recommendations to help them grow and protect their wealth. To learn more about how to bring this valuable financial planning tool to your key employees, contact your financial advisor or visit captrust.com today.

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