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

Phil D'Unger:

WealthView is a powerful tool CAPTRUST clients can use to simplify and visualize their financial lives with their advisors. The process starts by aggregating all of your financial assets and liabilities in one place so you can see everything holistically. This goes beyond just your investment portfolio and incorporates everything you own including real estate, businesses, and even more complex assets such as stock options or deferred compensation plans.

Consolidating all of your financial information allows you to quickly and easily see your total net worth on a single screen where everything you own and everything you owe is clearly organized. Once your financial life is well organized in one place, WealthView allows you to weigh the impact of current and future financial decisions on your life goals. Building out your financial profile will allow us to forecast your cashflow going forward, and it will shed light on planning opportunities you may be able to take advantage of.

In WealthView's decision center, you can visualize the impact of future financial decisions and their relative impact on your goals, and you can use WealthView's Monte Carlo simulator to put your plan to the test and predict your probability of lifetime financial success under various scenarios.

WealthView's forecasting tools provide deep insight into which actions to take and when to take them based on the outcomes that are most important to you and your family. We can also show how your assets will flow to your heirs and beneficiaries. The charts can be adjusted to illustrate your estate plan at any point in the future which helps you understand how your plan may be impacted over time.

Perhaps most importantly, WealthView is dynamic, which means it allows you and your financial advisor to simulate changes in real time and collectively consider the impact of those decisions on all aspects of your financial life. This can be done via virtual meetings or in-person where your financial plan can be updated instantly rather than relying on lengthy paper reports with information that might be outdated.

Lastly, WealthView's client portal gives you access to your entire financial life whenever and wherever you are via your computer phone or tablet. This is a private, secure portal that also provides a vault where you can store digital copies of important documents for you and your advisor to access. Your personal portal makes getting organized simple by allowing you to easily connect all of your accounts and consolidate your financial documents in one place.

We know your financial life is complicated, but making sense of it doesn't have to be. WealthView gives you the clarity and confidence to make the best financial decisions possible for your family today and into the future.