

*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.*

Christine Crowe (00:24):

Wilkinson has a hashtag motto, not just another law firm. We pride ourselves on our focus on the individual at every level of the firm, that flows through to every benefit that we offer to folks, including our 401K plan, and is a lot of the reason why we focus so much on what we do offer to people in terms of choices and education and the like.

(00:48):

CAPTRUST has been an outstanding partner in helping us work through the unique characteristics of our employee base and our participant base, and helping us work through those issues when designing our plan. Within the different groups within our firm, we've got amazing participation rates, our attorneys, associates and partners, our managers, and our non-attorney, senior advisors, the participation rate in those groups ranges from 93 to 100%. Among our staff, where you would typically have a much lower participation rate, our participation rate is close to 70%.

(01:27):

We attribute that to the strength of our plan, the offerings that it gives people, the flexibility that it gives people to contribute at a rate at which they are comfortable. CAPTRUST helps by providing materials that we can use to educate our folks about why it's so important to participate and contribute to your plan from a young age, how that can have a huge impact on your long term financial stability in your future, and why it's important to participate even if you're not at a point where you can maximize your contribution each year. Small amounts saved each year, again, help to your long-term financial stability.

*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.*

*CapFinancial Partners, LLC (doing business as "CAPTRUST" or "CAPTRUST Financial Advisors") is an Investment Adviser registered under the Investment Advisers Act of 1940. However, CAPTRUST video presentations are designed to be educational and do not include individual investment advice. Opinions expressed in this video are subject to change without notice. Statistics and data have come from sources believed to be reliable but are not guaranteed to be accurate or complete. This is not a solicitation to invest in any legal, medical, tax or accounting advice. If you require such advice, you should contact the appropriate legal, accounting, or tax advisor. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822 © 2023 CAPTRUST Financial Advisors*