

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 (00:00):

Wilkinson Barker is a primarily regulatory law firm. Our employee base sort of ranges from very senior attorneys down to very junior attorneys, and paralegals, and staff with very different financial resources and financial knowledge in terms of investments. The benefits from sponsoring our own plan beginning in 2016 were both immediate, and significant, and also sustained. Immediately upon transition to our own plan, we saved \$120,000 in record keeping costs. That's money that goes right back into the individual accounts of our plan participants. We have seen our participant rate increase by over 13%, the average size of participants' accounts increase over 20%. The rate at which our participants are contributing grew over 130%, and our record keeping fees have decreased over 33%. Again, all wonderful attributes to the strength of the plan, the fact that more people are willing to participate and are attracted to participate in the plan by the offerings that we are able to give, and the individualized plan design that we achieved by working with CAPTRUST.

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