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CAPTRUST at Work for Key Employees

As a partner, executive, or key employee with a potentially complex compensation package, one size fits all financial wellness tools may not be enough to address your complicated financial picture. But CAPTRUST is here to help. As part of your employee benefits package, your employer has provided you with a suite of products and services, including some that are focused on improving your financial well-being.

One of these is CAPTRUST at Work.

With CAPTRUST at Work, you have access to on demand support from a dedicated CAPTRUST financial advisor, one who is familiar with your organization's qualified and non-qualified plans, stock programs, and executive compensation. Through one-on-one conversations, your advisor can address timely questions and help you develop financial goals and plans that are tailored to you.

They can also create retirement income and wealth projections that help you visualize your financial future so that you can make better informed decisions on the way to retirement. As one of the country's leading retirement plan advisors, CAPTRUST has decades of experience in complex employee benefits.

We understand that financial wellness means more than just retirement assets. That's why our executive services CAPTRUST includes Advanced Financial Planning, Executive Compensation Planning, Company Stock Planning, Concentrated Position Management, Tax Optimization, Legacy Planning and Wealth Transfer, Risk Management and Insurance Assessment, and Business Succession Planning.

We can help you maximize your chances of success and minimize the risks

associated with accumulated wealth. One on one advisor meetings are available in person or virtually using video and screen share technology. As a CAPTRUST at work participant, you also have access to our vast library of industry leading financial wellness content, including Vested Magazine.

For those who are interested in moving beyond the planning process, CAPTRUST can also deliver comprehensive wealth management services, including ongoing discretionary asset management and implementation of all financial planning recommendations to help you grow and guard your wealth. CAPTRUST is a fiduciary which means our only focus is helping you and your family make good financial decisions. To get started, contact your CAPTRUST Financial Wellness Consultant or visit captrustatwork.com today.

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