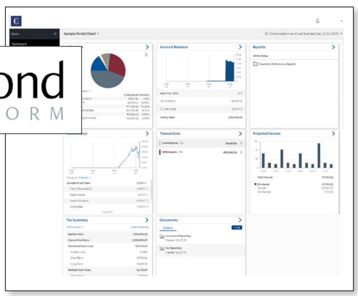
CAPTRUST ONLINE SERVICES

CAPTRUST's commitment to service beyond expectation includes making sure that you have secure online access to your financial life. Our suite of tools makes navigating your financial data simple and easy.

PERFORMANCE REPORTING

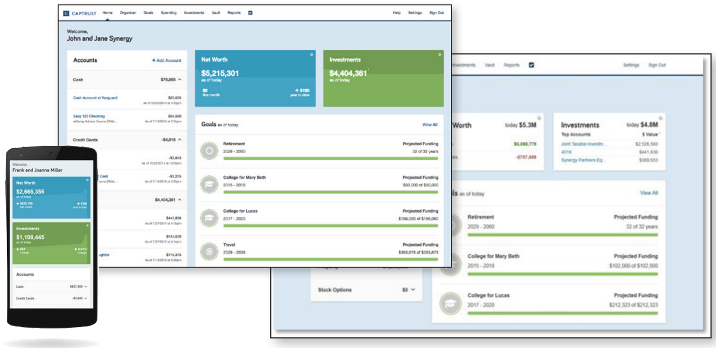
Through CAPTRUST's Black Diamond client portal, you can view your accounts' asset allocation, activity, gain/loss detail, time-weighted performance, and projected income and retrieve your quarterly performance reports. You can view this data by account grouping, account level, holding, and asset class.

Black Diamond
WEALTH PLATFORM



FINANCIAL PLANNING

WealthView is CAPTRUST's client portal for all things financial planning. Use WealthView to link bank and outside brokerage accounts for an up-to-date total portfolio and net worth summary, post documents in the secure document vault, and share data with your financial advisor. WealthView's mobile site allows users to access their real-time financial information on the go.



STATEMENTS AND TAX INFORMATION

Use your custodian's website to view and download transactions, statements, and tax data useful at year end for tax planning or return preparation.

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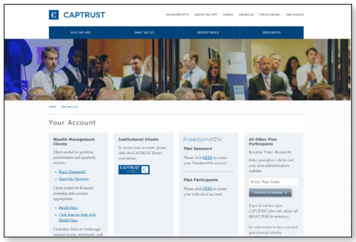
HOW TO ACCESS

The Your Account page on CAPTRUST's website—captrust.com—provides one-stop access to all these tools. Visit the website for access to *VESTED Magazine* content, articles, videos, and information about the firm.



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