ADVANCED PLANNING SERVICES

CAPTRUST Financial Advisors is an independent investment research and fee-based advisory firm specializing in providing investment advisory services to retirement plan fiduciaries, foundations, and endowments, and comprehensive wealth planning services to executives and high-net-worth individuals.

THE IMPORTANCE OF ADVICE

CAPTRUST's Wealth Advice Services for business owners provides specialized financial advice to help you retain business ownership while growing and preserving your assets. We provide customized strategies for building and protecting investments, business value, and wealth.

We have a multidisciplinary team of advisors who work with you to understand your objectives and unique business and family circumstances. We develop a strategic plan that takes into account current and future needs while building in flexibility to allow for future changes.

BENEFITS OF ADVANCED PLANNING

Our multigenerational wealth advisors provide you with a proactive, customized approach for prudently managing and integrating your business, estate, wealth, investment, and life insurance planning. We provide:

- Access to qualified team of highly specialized advisors
- Refinement of your long-term goals and objectives
- Creation of a personalized plan
- Modeling of financial opportunities
- Implementation of your planning strategies
- Coordination of your long-term plan with your other advisors

ADVANCED PLANNING SERVICES

We develop a solid understanding of your objectives and unique circumstances and build a plan that accounts for your current and future needs. Your planning is fully integrated in the following areas.

Wealth Planning
A forward-looking wealth plan that brings clarity to important decisions and builds a strong foundation for your investment, estate, and insurance planning.

Business and Estate Preservation Planning
A thoughtful and cohesive business and estate plan that balances your objectives and financial resources with your longer- term business, family, and charitable goals.

Investment Advisory
A well-conceived investment strategy that builds and preserves your wealth and makes the most of your portfolio assets to achieve your goals.

Life Insurance Advisory
A detailed review of your existing life insurance planning and recommendations for efficiencies and improvements.

If you are interested in these services or would like more information, please reach out to CAPTRUST by contacting our office at 610.865.2600 or by visiting our website at **captrust.com**

STRATEGIC ADVISOR GROUP

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