Wealth Solutions

CAPTRUST's Wealth Planning and Solutions team is part of the Wealth Management Group and supports our advisory teams with all financial planning resources. This also includes centralized wealth planning services, Family Office Services, and Blueprint Pro. Our team page serves as your go-to hub for resources around WealthView, financial planning content, Blueprint Pro, and overall resources pertaining to wealth management.

Wealth Solutions Team

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Wealth Planning Team

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Senior Specialist

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Specialist

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Associate II

MA

Moore, Austin
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Visit the Wealth Solutions Allego channel for our client-facing resources, including:

- Financial planning data gathering forms
- Topical Spotlight Library
- WealthView Training Videos
- Centralized Wealth Planning
- fpPathfinder Charts
- Family Office Services
- Portfolio Analytics
- Blueprint Pro

Wealth Solutions Allego Channel