



# CAPTRUST

## CAPTRUST DIRECT FAQs

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### Who is responsible for creating the initial “Welcome” CAPTRUST Direct email notification?

The CMC submits a service ticket containing instructions, along with contact names and emails address(es) to create CAPTRUST Direct access and send the initial email notification. Please allow a minimum of 3 days during peak times such as review season for the CMA team to turn the request around.

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### What does the initial “Welcome” CAPTRUST Direct email notification look like?



# CAPTRUST

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## Welcome.

Please click the link below to access your CAPTRUST portal account.

Once you click the link, you will be prompted to create a password and complete your security profile.

**[ACCESS HERE](#)**

This link expires in 30 days.

If you feel you have received this email in error, please contact your CAPTRUST financial advisor or call 800-967-9948 for Retirement Blueprint® questions.

Thank you.

*This is an automatically generated message from CAPTRUST. Replies are not monitored or answered.*





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### Is there a presentation and brainshark available that will be sent with the initial “Welcome” email notification?

Yes, there is a presentation and a brainshark available that can be sent; however, the Advisor Team will need to send as a separate email as it is not possible at this time to include with the initial notification.

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### How long is the initial “Welcome” email notification link active?

30 days.

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### What if my advisor does not like the initial “Welcome” email notification? Can they change and use their own?

The initial “Welcome” email is an already approved, consistent, firm-wide message. The Advisor Team may send the presentation and brainshark to the portal user(s) in advance of the “Welcome” email notification being sent with a more personalized note.

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### Is there a “Sample” email available for the Advisor Team to use as a guide when sending out the presentation and brainshark?

Yes, a “Sample” email can be found on the Institutional Team Page under “Training Presentations” / CAPTRUSTDirect.

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### I have an advisor that is doing a pitch. Is there a demo site available?

Yes, the demo CAPTRUST Direct website is available with the username and password slide located on the Institutional Team Page under “Supplemental Deliverables” / CAPTRUSTDirect.

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### What if my advisor has not told our clients about CAPTRUST Direct?

Take this as a great opportunity to be pro-active, have a conversation (or two), and work with your advisor or advisor team to roll out.

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### What if my advisor does not want our clients to know about or have access to CAPTRUST Direct?

Please do not have CAPTRUST Direct access created.

