CAPTRUST

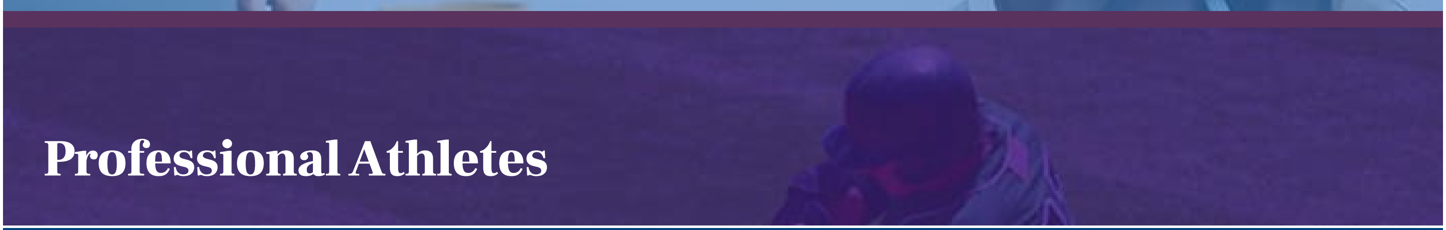
Solutions for Individuals

Comprehensive wealth planning and investment services tailored to your goals, delivered by experienced financial advisors.

Individual Investors

Individuals needing comprehensive wealth planning, risk management, and investment services tailored to their risk profile and goals.

Learn More



Professional Athletes

Accept

Learn More

Executives & Business Owners

Successful executives and business owners who need help managing their complex financial lives among the competing demands on their time.

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Families with Complex Needs

Many families have considerations and require coordination that go beyond the scope of services that most wealth management firms can deliver.

Learn More

All	Individual Investors	Executives & Business Owners	Professional Athletes

Families with Complex Needs

Account Aggregation

Secure online portal to enables clients to view their aggregated investment accounts and overall financial plan in one easy to use site.

Business Succession Planning

Financial and risk management strategies to protect wealth upon the retirement, disability, or death of a business owner or key employee.

Cash Flow Planning

Modeling and analysis of income, expenses, and strategies to understand the financial impact on long-term financial goals.

Charitable Gift

Planning

Advice and strategies to help clients better accomplish their charitable and philanthropic intentions.

Corporate Benefits Planning

Financial advice to help clients make important decisions regarding company-provided benefits, stock options, deferred compensation, dividends and distributions

Education, Estate, & Legacy Planning

Oversight and alignment of estate and education planning documentation with a client’s long-term goals to protect and preserve substantial assets.

Exit Planning

Helping entrepreneurs and business owners address the personal, tax, legal, and financial aspects of the sale of a business.

Family Governance Planning

Family investment and multi-generation strategies including education, distribution planning, and long-term trustee solutions.

Family Philanthropic Planning

Consultation on entity selection, governance, active/passive giving, and strategic prioritization.

Insurance Planning

Coordinate liquidity needs with business and estate objectives through portfolio architecture, acquisition, ongoing reviews, and aggregate reporting.

Performance

Reporting

Quarterly assessment of investment manager and portfolio returns and risk relative to peer groups and indexes.

Portfolio Construction & Management

Development and ongoing oversight of an investment strategy designed to achieve a client's goals and objectives.

Retirement Planning

Financial advice and investment strategies designed to help clients achieve their post-career income and lifestyle objectives.

Risk Management

Often used in place of or alongside insurance planning, risk management covers areas such as liability planning, income tax nexus, and unexpected events.

Tax Consulting & Compliance

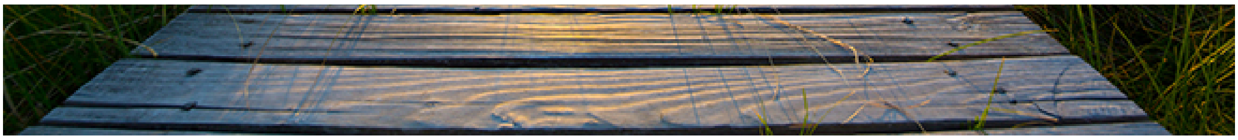
Tax consulting and compliance for individuals, trusts, estates, flow-through entities, and closely held entities.

Grow with CAPTRUST.

Grow with advisors you trust.

Watch now

I **Funding Life Goals**



I. Funding Life Goals

From retirement planning to education funding, eldercare considerations, and legacy planning.

CAPTRUST financial advisors work with their clients to understand their most urgent concerns and create custom financial strategies to set them on the right path.

II **Investment Management**

II. Investment Management

A financial plan is only as good as the investment engine that powers it.

CAPTRUST builds, manages, and monitors investment portfolios for clients that are tailored to their personal risk tolerances and designed to help them achieve their financial and life goals.

III **Risk Management**

III. Risk Management

Protecting against unforeseen events is a critical part of a well-crafted plan.

CAPTRUST helps clients identify the many risks they face, stress test their financial plans, and implement strategies to manage risks to their lives, goals, and plans.

Contact Us

What's on your mind?

First Name

Last Name

Email

City

State

Phone

Relation to CAPTRUST?

How did you hear about us?

Message

Submit

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4208 Six Forks Rd #1700
Raleigh, NC 27609

Phone
919.870.6822

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