

OUR INVITATION

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## OUR STORY

Many in the current generation of retirees do not have the financial security afforded by long term pensions. In the world of 401(k)s and IRAs, you must first generate and then manage your own retirement income. We specialize in retirement planning and will work with you to define and enjoy your retirement.



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If you are asking these questions and in search of an independent advisory firm to help you achieve financial confidence and security in retirement, we invite you to consider CapTrust.

Our clients are families and individuals who value the personalized attention from an intimate, experienced team while leveraging the investment opportunities only provided by large technology driven financial institutions. The professionals at CapTrust understand how to define and manage your investment portfolio, provide expert financial advice, and monitor activities effecting your accounts and personal security.

The key to successful retirement planning is achieving long term alignment between defined goals and disciplined investment strategies. Our relationship together will start with a retirement forecast that captures and clarifies your needs, opportunities and goals. From there, we will explore the complexities of this simple approach and integrate established financial principles, proprietary software and advanced technology to define the right investment approach for each client. As a fee-based provider, we have no ties to any specific financial institutions, leaving us free to access a full spectrum of investment opportunities for our clients.

Families and individuals looking for an independent financial partner with a cost-conscious and goal-oriented approach should contact CapTrust. Your assets, your future, are worth CapTrust.

## CONTACT

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