



## FINANCIAL WELLNESS AND ADVICE

CAPTRUST advice team members are available to consult with you as a part of your benefit package. Our goal is to make sure you feel confident about meeting your financial goals.



### MANY WAYS TO ENGAGE

- Consultations with an advisor by phone at 800.967.9948
- Live webinars
- Monthly e-newsletters



### RETIREMENT BLUEPRINT®

- CAPTRUST Retirement Blueprint® technology allows our financial advisors to give you personal retirement planning advice.
- The financial advisor will help you identify your goals and your risk tolerance.
- The financial advisor will take you through various “what if” scenarios to optimize different retirement strategies.
- You will have the opportunity to implement advice on the spot with assistance from your financial advisor.
- You will have access to your blueprint immediately after your consultation.
- A reminder will be sent to you on an annual basis to update your blueprint.



### CAPTRUSTADVICE.COM

There are a number of resources available to you on the participant website:

- Schedule your appointment with a financial advisor.
- Access helpful articles on a range of topics.
- Check your progress with financial calculators.
- Watch informative three-minute videos from CAPTRUST subject matter experts.
- Register for easy-to-understand topical financial webinars.
- View recordings of prior webinars.



### FINANCIAL WELLNESS

- CAPTRUST services and technologies help you address difficult financial challenges—from managing student loan debt to securing retirement
- CAPTRUST’s financial wellness and advice services meet you where you are in your career, with the help you need to answer the most pressing questions about your various financial goals

**CAPTRUST is here to help you plan, save, invest, and retire comfortably.**



**CAPTRUST**