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

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