



## HERE TO HELP YOU

### EXPERT ADVICE ON YOUR FINANCIAL WELLNESS NEEDS

CAPTRUST Financial Advisors, the independent financial advisory firm that works on the USG sponsored Retirement Programs, will be onsite conducting individual meetings as follows:

- Date: August 31<sup>st</sup>
- Address: University of Georgia - 315 S Thomas St, Athens, GA
- Location: Learning and Development Building, Room D

Topics covered in the forty-five-minute individual advisory sessions include, but are not limited to the following:

- Retirement and general financial planning
- Investment education and advice

You also will have an opportunity to create a Retirement Blueprint, CAPTRUST's interactive retirement readiness tool. The Blueprint is part of the USG Well-Being Program and is an unbiased, comprehensive financial plan that will help an employee to answer some difficult questions such as:

- Am I on track for retirement?
- How much do I need to save?
- How should I invest my money?
- When can I retire?
- How long will my money last?

To learn more about the Blueprint you can view a short, informative video by clicking [here](#).

These one-on-one sessions are offered to you solely as a benefit; be assured that CAPTRUST's role is not to sell you anything, but purely to help you make sound investment decisions.

[Click here to schedule an appointment](#)

### How Do I Schedule an Appointment?

1. Choose the 45-minute session you wish to attend.
2. Enter your information and click **Schedule It**. A confirmation email will then be sent immediately.
3. A reminder email will also be sent 24 hours in advance of the meeting.
4. If you need to cancel or change your meeting time, click the link received in the confirmation/reminder email. Then enter your last name and confirmation number.
5. If you have any questions or need assistance, please call CAPTRUST at 800.967.9948.

To best be prepared for these sessions, please make sure you have the information you want to include in your discussion such as retirement account statements and/or login information for your retirement accounts.

If you cannot make a live session, but still want or need further advice, the CAPTRUST Advice Desk is also available. Appointments can be made with the Advice Desk by visiting [www.captrustadvice.com](http://www.captrustadvice.com).