Financial Wellness and Advice

CAPTRUST AT WORK

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

MANY WAYS TO ENGAGE

- Financial wellness and advice from a Fiduciary
- Consultations with a financial advisor by phone
- Onsite group and individual meetings
- Live webinar events
- Monthly e-newsletters
- Our advice website, www.captrustatwork.com

CAPTRUSTATWORK.COM

Employees can access a range of resources at our advice website:

- Schedule an appointment with a financial advisor
- Access helpful articles on a range of topics
- Check progress with nine financial calculators
- Watch short videos from CAPTRUST subject matter experts
- Register for topical financial webinars
- View recordings of past webinars

Sources: PwC, "Employee Financial Wellness Survey: 2017 Results," 2017; Financial Engines and Aon Hewitt Study, "Help in Defined Contribution Plans: 2006 through 2010," 2011; *Corporate Wellness Magazine*, "Beyond the Paycheck: When Does a Financial Wellness Program Make Sense?"

RETIREMENT BLUEPRINT

- CAPTRUST's Retirement Blueprint® technology allows our financial advisor to deliver personalized retirement planning advice over the phone, on-site, or in a group setting
- Financial advisor guide employees in identifying their goals and risk tolerance
- What-if scenario planning allows retirement strategies to be optimized for the individual
- Employees can implement advice on the spot with assistance from the financial advisor
- Each Blueprint is delivered directly to the employee
- Annual reminders are sent to employees to encourage continuous engagement and to remind them to update their information

FINANCIAL WELLNESS

- America's diverse workforce is looking for help in addressing difficult financial challenges—from managing student loan debt to securing retirement
- CAPTRUST's financial wellness and advice services meet employees where they are, with the help they need to answer their most pressing questions. Help is available in person, over the phone, or online

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

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